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ABSTRACT

This report describes the Career Preparation Initiative in Financial Services (CPI-FS), a tech prep program in financial services based at Harold Washington College and Jones Metropolitan High School. Two key features are the redesign of similar programs operating at both schools to reflect elements of the tech prep model and the use of a large public-private planning committee. Major accomplishments are detailed: identification of 137 performance standards in 6 skill categories that employers expect in high quality entry-level employees, translation of them into 29 learning objectives, development of an employer recruitment video and brochure and general marketing piece, and formation of a curriculum committee of secondary and postsecondary academic and vocational teachers. The nine-page report is followed by these attachments: list of Full Implementation Team members; proposed financial services career trainee performance standards; list of learning objectives; career preparation educational philosophy; CPI-FS proposed academic and social policy; curriculum committee members and scope of work and assignments; advisory board members; Request for Proposal: Marketing Material for CPI-FS; list of chief executive officers (CEOs) participating in the video; talking points and interview questions for CEOs in the video project; brochures; meeting agendas; and publicity materials. (YLB)

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DEPARTMENT OF ADULT, VOCATIONAL AND TECHNICAL EDUCATION  
VOCATIONAL EDUCATION PROGRAM IMPROVEMENT  
FINAL REPORT ABSTRACT

ED 361 570

Funding Agreement Number: 1-0907-053

Official Project Title: Technical Preparation Development - Financial Services

Project Director: Sharon Wheeler, Bernard Ferreri - Co-Directors (sub-grant - Diana L. Robinson)

Funded Agency: City Colleges of Chicago (Harold Washington College)

Time Period Covered: July 1, 1991 - June 30, 1992

Goals of Project and Relevancy to Vocational Education: This first year Tech Prep planning grant incorporates the goals stipulated under the federal Carl D. Perkins Vocational and Applied Technology Act of 1990:

- Integration of vocational and academic skills, with an emphasis on critical thinking skills;
- Teaching of "all aspects of the industry";
- Provision of services to special needs students;
- Participatory planning of students, parents, school staff, community representatives and business in developing programs.

These goals are addressed through the 26 project objectives, each of which is described in the narrative of the report.

Major Accomplishments of the Project:

- Identification of 137 performance standards in six skill categories which employers expect in high quality entry-level employees.
- Translation of these performance standards into 29 learning objectives.
- Articulation of an educational philosophy and academic/social policy.
- Development of an employer recruitment video and companion brochure and a general marketing piece. (These items were funded by a \$15,000 grant from the MacArthur Foundation.)
- Formation of a Curriculum Committee comprising academic and vocational teachers at secondary and post-secondary levels to review existing curriculum material and implement employer recommendations.

Products Delivered:

Final Report, 2 copies, delivered to Sharon Wheeler on July 17, 1992

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## 2. MAJOR ACCOMPLISHMENTS AND SIGNIFICANT FINDINGS OF THE PROJECT

The Tech Prep program in financial services is based in Harold Washington College and Jones Metropolitan High School and is called the Career Preparation Initiative in Financial Services (CPI-FS). Two features of this program are key: (1) CPI-FS involves the redesign of a similar program already in operation at both schools, the Chicago Academy of Finance, to fully reflect the elements of the Tech Prep model; and (2) it is effectively using a large public-private planning committee to achieve this redesign and to provide ongoing monitoring and quality control. Due in large part to the existence of this planning committee, the CPI-FS Implementation Team ("I-Team"), 19 of the 26 project objectives is either fully accomplished or near completion (see Attachment A for list of I-Team members). Major accomplishments include:

- Identification of 137 performance standards in six skill categories which employers expect in high quality entry-level employees (see Attachment B). These standards were validated by three focus groups of employers in the insurance, real estate, and securities/commodities/brokerage sectors.
- Translation of these performance standards into 29 learning objectives (see Attachment C).
- Articulation of an educational philosophy and academic/social policy (Attachment D and E).
- Development of an employer recruitment video (Attachment F) and companion brochure and a general marketing piece (the latter two items to be submitted by July 31, 1992). These items were funded by a \$15,000 grant from the MacArthur Foundation.
- Formation of a Curriculum Committee comprising academic and vocational teachers at secondary and post-secondary levels to review existing curriculum material and ensure that all I-Team recommendations are addressed within the course sequence and content. Attachment G lists the Curriculum Committee members and Attachment H contains the committee's scope of work.
- Agreement that the I-Team will have a continuing role in project implementation and monitoring.

In addition to the Curriculum Committee, the I-Team also formed a Competency Development Committee (Attachment I) and a CEO Recruitment Committee (Attachment J) to focus respectively on the development of performance standards and employer recruitment material.

The 26 project objectives are listed below with their corresponding activities. Of these, 15 were wholly completed and another 4 partially completed; six will be addressed during the next project year; and only one objective was deemed unfeasible but was satisfactorily addressed through alternative resources.

- A1. Review and refine work plan, evaluation components and anticipated outcomes with core implementation staff.

**Activity: COMPLETE.** The original work plan has been revised to reflect work in progress and extended through May 1992, and was approved by the full Implementation Team on January 29, 1992.

- A2. Identify Chicago Board of Education representatives for the Chicago Academy of Finance Advisory Board.

**Activity: COMPLETE.** Three Chicago Board of Education representatives are indicated on the current Advisory Board membership list (Attachment I) and

include Cozette Buckney, Principal of Jones Metropolitan High School; Loleta McDowell, Administrator, High School Service Center; and Bernard Spillman, Assistant Superintendent for Vocational and Technological Education, Chicago Public Schools.

- A3. Develop mechanism/forum for coordinating curriculum development between high school and community college components.

**Activity: COMPLETE.** On June 19, 1992 the Curriculum Committee of the CPI-FS I-Team was convened. Committee members and a scope of work are represented in Attachments G and H.

- A4. Obtain employer-affirmed entry level skills from CPI I-Team.

**Activity: COMPLETE.** The list of performance standards approved by the I-Team during the first quarter was reviewed by three industry focus groups in the commodities/securities/brokerage, insurance and real estate sectors on December 5th, 6th and 9th, respectively. The changes resulting from these focus groups were adopted by the full I-Team on December 9, 1991.

This effort continued through the work of the I-Team's Competency Development Committee, which convened on January 27, 1992 to begin translating the 137 performance standards into measurable competencies. This committee also met on February 13, March 3, March 24, April 7 and May 12. Their recommendations, which comprise 29 learning objectives and specify measurement standards and evaluation methods, were approved by the full I-Team on May 28, 1992.

- A5. Develop informational and recruitment materials for the entire program.

**Activity: PARTIALLY COMPLETED.** A CEO Recruitment Committee was convened on November 13, 1991 to address this task. They recommended that \$15,000 in additional funds be obtained to support the development of employer recruitment material, which were subsequently provided through the Productive Chicago Office of City Colleges of Chicago. A Request for Proposal to obtain professional services was drafted and distributed to committee members for review on March 30. Work products included a short video targeted to the CEO level but with a secondary audience of all employers; a companion employer-oriented brochure; and a brochure for student recruitment. After comments were received the RFP was revised and distributed to potential firms. A copy of the draft RFP is attached as Exhibit J.

The CEO Recruitment Committee met on April 21, 1992 to review the five proposals received in response to the RFP and selected Video Services, a subsidiary of the not-for-profit organization Community TV Network, as the consultant. Video Services began work in early May 1992, and met with the CEO Recruitment Committee on May 27 to brainstorm on product content and format.

During the month of June 1992 the I-Team worked to identify CEOs willing to participate in the filming of the videotape. Seven CEOs ultimately agreed to do so (Attachment K), were briefed, provided with talking points, interview questions and a video overview (Attachment L), and filmed by Video Services. The final video is presented as Attachment F.

Text for the employer brochure was approved by the CEO Recruitment Committee on July 7, 1992 and the full I-Team on July 16, 1992. While the

brochure will not be available until July 31, 1992, the copy is provided as Attachment M.

In lieu of a student recruitment brochure, it was agreed that a more versatile marketing piece would be developed. This will consist of a folder with three inserts: one for students, a second for parents, and a third for school administrators, teachers and local school council members. The final marketing kit will also be available by July 31, 1992.

- A6. Develop in consultation with the Chicago Academy of Finance Advisory Board an appropriate reporting format to accommodate the entire CPI-FS program.

**Activity: POSTPONED.** On December 5, 1992, Alex Robinson, the Chair of the I-Team, presented a comprehensive overview of CPI-FS to the CAF Advisory Board. The Advisory Board will review the relationship between the Chicago Academy of Finance and CPI-Financial Services after the latter has formulated its final recommendations. It is anticipated that this will occur in August or September, 1992. At that time the issue of reporting will be revisited.

- A7. Prepare evaluation format and timetable to address such components as recruitment, enrollment, retention, student performance, internships, permanent job placement, public relations, program outcomes.

**Activity: COMPLETE.** These are being addressed through the high school Tech Prep grant.

- B1. Secure formal National Academy Foundation (NAF) approval for a Chicago Academy of Finance program at Jones Metropolitan High School.

**Activity: COMPLETE.** Verbal NAF approval received in July 1991. Written approval received February 1992.

- B2. Identify instructors and orient to NAF program.

**Activity: COMPLETE.** Five Jones High School teachers have been assigned to the Chicago Academy of Finance: Maggie Culver, Annie Miller, Earl Silverman, George Williams, and Joseph Zale. These instructors were oriented by the Director of the Chicago Academy of Finance on June 20, 1991.

- B3. Secure curriculum materials and provide technical assistance to instructors.

**Activity: COMPLETE.** These materials and assistance were acquired during a site visit to the National Academy Foundation headquarters in New York on May 20 - 21, 1991 with three high school representatives: Maggie Culver, Annie Miller, and Loleta McDowell.

- B4. Develop teacher internships at local financial service companies.

**Activity: COMPLETE.** Four teachers and a Vice Principal from Jones High School participated in a week-long orientation to the financial services industry developed by the CAF director from August 13 - 16.

- B5. Provide stipends for instructors for curriculum writing that adapts NAF curriculum to their classes and incorporates the I-Team's competencies and skill levels.

**Activity: NEAR COMPLETION.** A line item in the amount of \$17,500 has been included in this grant budget for curriculum development. Five teachers on the I-Team's Curriculum Committee are receiving stipends for their curriculum development work, which will be complete by August 31, 1992.

- B6. Develop and implement student recruitment literature and strategy.

**Activity: NEAR COMPLETION.** The student recruitment material being developed by Video Services will be printed by July 31, 1992. This information will be presented to incoming 11th grade Chicago Academy of Finance students at Jones High School to recruit them into the first CPI-FS class.

- B7. Develop and implement employer recruitment package and strategy.

**Activity: COMPLETE.** See A5. above.

- B8. Arrange for community-college level foreign language class for 11th graders.

**Activity: UNFEASIBLE.** This task was not pursued when it was determined that the Jones students had insufficient time in their schedules for a full period of a college-level foreign language. However, the foreign language is being provided through a high school level French teacher.

- B9. Organize major public relations event announcing launch of CPI-FS.

**Activity: POSTPONED.** The I-Team agreed that such an event will be held after the first class of CPI-FS students is in place and needed employer commitments are secured. It is anticipated to occur in September 1992.

- B10. Develop summer internships and procedures for 11th grade completers.

**Activity: COMPLETE.** The 34 student who successfully completed the first year of their academic and vocational preparation in the Chicago Academy of Finance have all been placed in summer internships. Students will work for a minimum of six weeks for at least 20 hours per week. Employers include:

Aon Corporation  
Central City Productions  
Chicago Academy of Finance  
Chicago Tribune  
CitiBank  
City of Chicago  
Ernst & Young  
First National Bank of Chicago  
Gardner Rich & Co.  
Harris Bank

Illinois Bell  
Kemper Securities, Inc.  
LaSalle Bank Lakeview  
Leo Burnett  
Midwest Stock Exchange  
The Northern Trust Company  
Northwestern Railroad  
Prudential Realty Group  
Shearson Lehman Brothers, Inc.  
South Shore Bank

- B11. Determine feasibility of developing/requiring entrance or exit standards for CPI-FS program.

**Activity: NEAR COMPLETION.** Entrance requirements will be recommended by the Curriculum Committee in their final report in August 1992. Exit standards are reflected in the performance standards and learning objectives approved by the I-Team.

- B12. Identify possible college-level "Principles of Finance" class for 12th graders.

**Activity: POSTPONED.** Due to a recent decision on the part of the Board of Trustees of City Colleges of Chicago to eliminate instructional overtime, many classes at Harold Washington College (HWC) have been cancelled for the '92-'93 academic year. As a result, HWC's instructional staff have asked that this request be revisited in September 1992 when the full impact of these class cancellations on special classes will be clearer.

- B13. Initiate discussions with City Colleges of Chicago regarding Advanced Placement credit for college level courses.

**Activity. POSTPONED.** The current placement and testing procedures throughout the City Colleges of Chicago is being reviewed by a faculty/administrator panel for purposes of instituting systemwide changes. This objective can not be pursued until this issue is resolved.

- C1. Review student and employer marketing materials and strategies for purposes of possible modification.

**Activity: COMPLETE.** See A5. above.

- C2. Identify instructors to assist with curriculum review and development process.

**Activity: COMPLETE.** See A3 and B5 above. Five have been identified:

Clarence Brown, Acting Chair, Business Department, Harold Washington College

Dorothy Brownstein, Vocational Teacher, Jones Metropolitan High School

Raymonda Johnson, Chair, English Department, Harold Washington College

Jack Lombard, Associate Professor, Chicago City-Wide College

Mary McPherson, Curriculum Coordinator, Jones Metropolitan High School

- C3. Prepare curriculum development work plan with instructors and college administration.

**Activity: COMPLETE.** See Attachment H.

- C4. Initiate discussions with local colleges/universities regarding articulation with CPI-FS, including transferability of credits.

**Activity: POSTPONED.** This objective can not be addressed until the work of the Curriculum Committee is complete and reviewed by the I-Team.

- C5. Continue established procedures for student and employer recruitment, student support services, internship and permanent job development, other program components.

**Activity: COMPLETE.**

Jones High School:

- 39 students were screened, interviewed and enrolled as the charter CAF class at Jones Metropolitan High School (see Attachment N). Another 7

were admitted early in the school year. Forty-one students completed the first year.

- Special activities were planned and executed to complement the academic offerings: monthly breakfasts with financial services employers (Attachment O contains the programs); election of CAF class officers; assignment of mentors; visitation by the Atlanta Academy of Finance, and special events to launch the program (Attachment P) and honor students who completed their first year of the program (Attachment Q).
- 100% of the 34 eligible students completing the 11th grade CAF program were placed in paid summer internships.

Harold Washington College:

- 66 students enrolled in the CAF program at Harold Washington College in the Fall '91 semester, of whom 57 successfully completed the semester. For the Spring '92 semester, 47 students enrolled and 43 completed.
- Eight "Strategies for Success" seminars were offered for students throughout the '91-'92 academic year (Attachments R and S) and were attended by a total of 139 students. In addition, 110 persons were counseled regarding CAF. No students were eligible for internships, but two were placed in permanent jobs in financial services companies.

C6. Implement community college evaluation plan.

**Activity: POSTPONED.** While evaluation of the college component will not become relevant until competencies are integrated into the curriculum or until the first high school class enrolls in the college, an evaluation component will be recommended by the I-Team during the next program year.

3. EVALUATION AND IMPACT

Evidence of program effectiveness is provided by:

- The successful adoption of a high school Tech Prep site at Jones Metropolitan High School;
- a student retention rate at Jones High School of 87% and at Harold Washington College of 80%;
- a student academic achievement rate for students earning at least a "C" grade point average of 91.2% at Jones and 88% at Harold Washington College;
- a 100% student placement rate for summer internships at Jones; and
- significant employer support and involvement through the CPI-FS Implementation Team and the CAF Advisory Board.

In addition, 15 of the 26 project objectives were completed and another 4 partially completed. Six will be addressed during the next project year and only one objective was deemed unfeasible, but was satisfactorily addressed through alternative resources.

4. RESOURCE LISTINGS

- A. No instructional resources or materials were purchased for this project with grant funds.

B. Paid Participants

- Diana L. Robinson, Director, Chicago Academy of Finance, project administration services  
Clarence Brown, Acting Chair, Business Department, Harold Washington College, curriculum development assistance  
Dorothy Brownstein, Vocational Teacher, Jones Metropolitan High School, curriculum development assistance  
Raymonda Johnson, Chair, English Department, Harold Washington College, curriculum development assistance  
John Lombard, Professor, Chicago City-Wide College, curriculum development assistance  
Mary McPherson, Curriculum Coordinator, Jones Metropolitan High School, curriculum development assistance

C. Unpaid Participants

See I-Team list (Attachment A)

See Chicago Academy of Finance Advisory Board list (Attachment I)

Guest Speakers at Jones High School:

- Lauren Claire, Auditor, Arthur Andersen & Co.  
Dallas Creitlon, Tax Consultant, Arthur Andersen & Co.  
Lawrence Geraghty, Senior Vice President, Shearson Lehman Bros.  
Felicia Haraway, Ernst & Young  
Karen Jones, Manager of Travel Services, American Express Co.  
Marya Kovacic, Corporate Training, The Northern Trust Co.  
James Lowry, First Scholar, First National Bank of Chicago  
Sharon Marioka, Financial Services Representative, American Express Co.  
James Mason, First Scholar, First National Bank of Chicago  
Eric Nance, Ernst & Young  
Michael Richards, Manager, Arthur Andersen & Co.  
Levoyd Robinson, Corporate Banking Officer, First Chicago  
Michael Skinner, Vice President, Shearson Lehman Bros.  
Al Thomas, Financial Consultant, Shearson Lehman Brso.  
Bruce Williams, Staff, Arthur Andersen & Co.

Guest Speakers at Harold Washington College:

- Bob Chrismer, Vice President, First Chicago  
Tony Fuller, Assistant Director of Recruiting, Arthur Andersen & Co.  
Michael McGillicuddy, Vice President, The Chicago Corporation  
John McGinley, Manager, CNA Insurance  
Karen Murphy, Vice President, LaSalle Bank Lakeview  
Chryssa Regas, Staff Recruiter, North American Company for Life and Health Insurance  
Maria Rodriguez, Gardner Rich & Co.  
Karen Stark, Employment Representative, First Chicago  
Mel Stoesser, Assistant Manager, Consumer Credit Counseling Service  
Elaine M. Virant, Professional Employment Specialist  
Joseph Webb, Human Resource Officer, First Chicago

5. **PROBLEMS**

The most significant problem encountered during the grant period was a delay in the start-up of the curriculum development effort. This was due to the work plan of the CPI-FS I-Team, who did not sign off on the learning objectives until April 1992. However, a team of secondary and post-secondary academic and vocational teachers has been assembled for this project and work will be completed by the beginning of the next grant year.

The other departure from planned activities was due to recent policy changes occurring within the City Colleges of Chicago in the areas of course scheduling and student placement. It is not yet clear how the deliberations by the City Colleges Board of Trustees will impact the Tech Prep program in these areas.

## 6. CONCLUSIONS AND RECOMMENDATIONS

- .. A Tech Prep program can succeed only if all three partners — the community college, high school, and employer community — are actively involved in program planning and implementation.
- An important benefit of an effective Tech Prep planning process is the education and sensitization of the partners to each others' perspectives, issues, and capabilities.
- There is significant employer support for a Tech Prep program in financial services provided that employers have validated student competencies, are involved in program development, and have confidence in the educational partners' ability to deliver on their responsibilities.

## 7. PUBLICITY

Six articles were published about the Chicago Academy of Finance in the Jones Reporter (Attachment T).  
Visits to the project sites by individuals other than those listed above include:

Adrienne Bailey, Deputy Superintendent, Chicago Public Schools  
Atlanta Academy of Finance, Director and Students  
Business Advisory Council Members, Jones High School  
Local School Council Members, Jones High School  
Phyllis Frankfort, Executive Director, National Academy Foundation  
Grady Jordan, High School District Superintendent, Chicago Public Schools  
Ted Kimbrough, Superintendent, Chicago Public Schools  
Shirley Macklin, Acting Manager, Tech Prep, Chicago Public Schools  
Marsha Phelps, Tech Prep Project, ISBE  
Bernadette Toomey, Vice President, National Academy Foundation  
Susan Zimny, Program Director, National Academy Foundation

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## **FINANCIAL SERVICES CAREER TRAINEE PROPOSED PERFORMANCE STANDARDS BY PROGRAM YEAR**

Following is a proposed list of suggested performance standards to be addressed by the Career Preparation Initiative in Financial Services (CPI-FS) over the four years of education and training comprising that program. The focus of these standards is the knowledge and skills necessary to master any entry level position within the financial services industry. It is expected that students will acquire additional knowledge and skills required by the Illinois Board of Education and Illinois Community College Board in the course of their educational programs.

**Standards reflected in this inventory are taken from five sources:**

- existing curriculum material from the Chicago Public Schools, the City Colleges of Chicago, and the National Academy Foundation;
- basic skills identified by employer representatives on the CPI-FS Implementation Team;
- a DACUM ("Developing a Curriculum") process conducted for CPI-FS;
- skills identified by the national Secretary's Commission on Achieving Necessary Skills (SCANS); and
- a series of focus groups held with representatives of the insurance, real estate and securities/commodities/brokerage sectors in December 1991.

**These performance standards have been validated by a cross-section of Chicago's financial services industry and reflect three key dimensions:**

1. The level of attainment: partial knowledge ("PK") or mastery ("M").
2. The point at which the standard should be attained (years 11-12 or 13-14, the latter two years occurring in the community college system).
3. Whether some amount of learning should occur in the workplace and during which years of the program. This is indicated by a "Yes" in the column under "*Workplace*".

# FINANCIAL SERVICES CAREER TRAINEE PERFORMANCE STANDARDS BY PROGRAM YEAR

	Yrs. 11-12	Work- place	Yrs. 13-14	Work- place
<b>I. Basic Academic Skills</b>				
A. Reading (locates, understands, and interprets written information in prose and documents)	M	_____	_____	_____
B. Writing				
1. Communicates thoughts, ideas, information, and messages in clear and grammatically correct writing	M	_____	_____	_____
2. Creates simple documents such as letter, directions, graphs	M	_____	_____	_____
3. Creates more complex documents such as manuals, reports, flow charts	PK	_____	M	Yes
C. Arithmetic/Mathematics				
1. Performs basic computations	M	_____	_____	_____
2. Approaches practical problems by choosing appropriately from a variety of mathematical techniques	PK	_____	M	_____
D. Listening (receives, attends to, interprets, and responds to verbal messages and other cues)	M	_____	_____	_____
E. Speaking				
1. Organizes ideas and communicates orally in a clear and grammatically correct manner	M	_____	_____	_____
2. Makes presentations and speaks publicly	PK	_____	M	_____
F. Formulates and asks questions	M	_____	_____	_____
<b>II. Thinking (Note: All thinking skills should be applied to a variety of situations)</b>				
A. Thinks creatively (generates new ideas)	PK	_____	M	Yes
B. Makes decisions (specifies goals and constraints, generates alternatives, considers risks, evaluates, and chooses best alternative)				
1. Simple decision-making	M	Yes	_____	_____
2. Complex decision-making	PK	Yes	M	Yes
3. Ethical decision-making	PK	Yes	M	Yes
C. Solves problems (recognizes problems and devises and implements plans of action)				
1. Simple problem-solving	M	Yes	_____	_____
2. Complex problem-solving	PK	Yes	M	Yes
D. Conceptualizes (organizes and processes symbols, pictures, graphs, objects, and other information)	PK	_____	M	Yes
E. Knows how to learn (uses efficient learning techniques to acquire and apply new knowledge and skills)	PK	_____	M	_____
F. Reasons (discovers a rule or principle underlying the relationship between two or more objects and applies it in problem solving)	PK	_____	M	_____
G. Demonstrates understanding of "common sense" and "good judgement"	PK	Yes	M	Yes
<b>III. General Vocational Skills</b>				
A. Processes information				
1. Identifies a variety of methods/formats for organizing information/data	PK	_____	M	Yes
2. Organizes data for entry	M	_____	_____	_____
3. Inputs and stores documents and files	M	_____	_____	_____
4. Maintains documents and files	M	_____	_____	_____
5. Prints and correctly distributes information	M	Yes	_____	_____
6. Checks document for spelling, grammar, and accuracy	M	_____	_____	_____

	<u>Yrs.</u> <u>11-12</u>	<u>Work-</u> <u>place</u>	<u>Yrs.</u> <u>13-14</u>	<u>Work-</u> <u>place</u>
<b>B. Operates a computer</b>				
1. Understands basic computer concepts (PC and mainframe)	M	_____	_____	_____
2. Performs start-up functions	M	_____	_____	_____
3. Selects and sets document format and page specifications	M	_____	_____	_____
4. Inputs data in appropriate format	M	Yes	_____	_____
5. Demonstrates editing functions	M	_____	_____	_____
6. Originates a data entry file	M	_____	_____	_____
7. Selects the appropriate file to add new data	M	_____	_____	_____
8. Prints mailable documents	M	_____	_____	_____
9. Edits records and modifies files for production	M	_____	_____	_____
10. Maintains a system of storage and retrieval	PK	_____	M	Yes
11. Demonstrates basic knowledge of spreadsheet software including formatting, creating formulae, and printing	M	_____	_____	_____
12. Demonstrates basic knowledge of database software including retrieving files; deleting, adding, and sorting records; and formatting and printing reports	M	_____	_____	_____
<b>C. Performs technical support duties</b>				
1. Follows oral and written directions accurately	M	_____	_____	_____
2. Demonstrates keyboarding skills	M	_____	_____	_____
3. Reviews and organizes data for typing/keyboarding	M	_____	_____	_____
4. Processes incoming and outgoing mail	M	_____	_____	_____
5. Demonstrates proper business etiquette in greeting visitors/clients, making introductions, escorting visitors to proper area/person, offering assistance	M	Yes	_____	_____
6. Performs telecommunications activities				
a. Demonstrates basic knowledge of telephone functions	M	Yes	_____	_____
b. Demonstrates proper telephone etiquette/procedures	M	Yes	_____	_____
c. Takes messages accurately	M	Yes	_____	_____
d. Accesses voice mail messages; leaves clear, concise voice mail messages	M	Yes	_____	_____
e. Prepares documents to be faxed	M	Yes	_____	_____
7. Maintains office supplies and forms	M	Yes	_____	_____
8. Demonstrates basic knowledge of office equipment, including simple maintenance	PK	Yes	M	Yes
9. Organizes, plans and prioritizes work activities	PK	Yes	M	Yes
10. Demonstrates alphabetic and numerical filing skills	M	_____	_____	_____
11. Transcribes verbal communications into written messages	M	Yes	_____	_____
12. Demonstrates note-taking skills	M	_____	_____	_____
<b>D. Communicates effectively</b>				
1. Composes and prepares written business communication				
a. Determines purpose and audience	PK	Yes	M	_____
b. Organizes major ideas and composes ideas in clear and concise form	PK	Yes	M	_____
c. Demonstrates business vocabulary skills	PK	Yes	M	Yes
d. Spells correctly	M	_____	_____	_____
e. Uses proper grammar for business communications	M	_____	_____	_____
f. Demonstrates knowledge of acceptable letter and report formats	M	Yes	_____	_____
2. Delivers oral business communication				
a. Makes recommendations to supervisors/co-workers	PK	Yes	M	Yes
b. Gives directions clearly and concisely	M	_____	_____	_____
c. Communicates clearly and concisely in pressure situations	PK	Yes	M	Yes
d. Responds appropriately to nonverbal or implied communication	PK	Yes	M	Yes
e. Speaks tactfully	M	Yes	_____	_____
f. Does not use slang	M	_____	_____	_____

	<b>Yrs. 11-12</b>	<b>Work- place</b>	<b>Yrs. 13-14</b>	<b>Work- place</b>
3. Demonstrates interpersonal skills to solve problems				
a. Exercises leadership (listens to and communicates ideas to justify position, persuades and convinces others, responsibly challenges existing procedures and policies)	<u>PK</u>	<u>Yes</u>	<u>M</u>	<u>Yes</u>
b. Negotiates (works toward agreements involving exchange of resources, resolves divergent interests)	<u>PK</u>	<u>Yes</u>	<u>M</u>	<u>Yes</u>
c. Considers opinions and suggestions of others	<u>M</u>	<u>Yes</u>		<u>Yes</u>
d. Delivers and accepts constructive criticism and positive feedback from others	<u>PK</u>	<u>Yes</u>	<u>M</u>	<u>Yes</u>
e. Uses effective questioning and seeks out information to investigate problems	<u>PK</u>	<u>Yes</u>	<u>M</u>	<u>Yes</u>
4. Trains new employees				
a. Develops an on-the-job training program for a new employee, determining training needs, methods, and time frame			<u>PK</u>	<u>Yes</u>
b. Demonstrates training skills, implements training plan			<u>PK</u>	<u>Yes</u>
c. Reviews and assesses trainee's progress			<u>PK</u>	<u>Yes</u>
E. Customer/Employee Relations				
1. Understands importance of both internal and external customers	<u>M</u>			
2. Establishes a positive rapport with clients, customers	<u>PK</u>	<u>Yes</u>	<u>M</u>	<u>Yes</u>
3. Evaluates and prioritizes customer's concerns	<u>PK</u>	<u>Yes</u>	<u>M</u>	<u>Yes</u>
4. Offers optional/alternatives to meet customer needs			<u>PK</u>	<u>Yes</u>
5. Refers customers to proper departments	<u>M</u>	<u>Yes</u>		
6. Demonstrates knowledge of specific company's products and services			<u>PK</u>	<u>Yes</u>
7. Matches customer needs to product/services available			<u>PK</u>	<u>Yes</u>
8. Demonstrates product/service presentation skills			<u>PK</u>	<u>Yes</u>
9. Resolves misunderstandings and conflicts or refers problem			<u>PK</u>	<u>Yes</u>
<b>IV. Industry-Specific Knowledge and Skills</b>				
A. Demonstrates conceptual knowledge of:				
1. Purpose and function of business	<u>PK</u>		<u>M</u>	
2. How companies of all sizes are organized	<u>PK</u>		<u>M</u>	
3. Sectors comprising the financial services industry:				
a. banking and credit	<u>PK</u>		<u>M</u>	
b. insurance	<u>PK</u>		<u>M</u>	
c. real estate	<u>PK</u>		<u>M</u>	
d. securities/commodities/brokerage	<u>PK</u>		<u>M</u>	
e. accounting	<u>PK</u>		<u>M</u>	
4. Economics	<u>PK</u>		<u>M</u>	
5. Marketing, sales and distribution	<u>PK</u>		<u>M</u>	
6. Management	<u>PK</u>		<u>M</u>	
7. Personal investment fundamentals	<u>PK</u>		<u>M</u>	
8. Business law			<u>PK</u>	
B. Understands career opportunities in each financial services sector	<u>PK</u>	<u>Yes</u>	<u>M</u>	<u>Yes</u>
C. Accounting/Bookkeeping				
1. Records entries in journals and ledgers	<u>M</u>			
2. Identifies methods and formats for recording expenditures and receipts	<u>M</u>			
3. Maintains accurate records of financial transactions				
a. For a personal budget	<u>PK</u>		<u>M</u>	
b. For a corporate budget			<u>PK</u>	<u>Yes</u>
4. Compares actual expenditures to budget projections				
a. For a personal budget	<u>PK</u>		<u>M</u>	
b. For a corporate budget			<u>PK</u>	<u>Yes</u>

- 5. Identifies variances and measures to bring expenditures in line with budget
  - a. For a personal budget
  - b. For a corporate budget
- 6. Prepares a personal income tax return
- D. Demonstrates familiarity with a particular vocational area within financial services (e.g. property maintenance)
  - 1. Understands technical terminology
  - 2. Understands basic operations
  - 3. Identifies relevant information sources for research purposes (if applicable)

Yrs. 11-12    Work-    Yrs. 13-14    Work-  
place    place

Yrs. 11-12	Work- place	Yrs. 13-14	Work- place
PK		M	
M		PK	Yes
PK	Yes	M	Yes
PK	Yes	M	Yes
		M	Yes
M			
M			
M			
M			
M	Yes		
M	Yes		
M			
M			
M	Yes		
PK	Yes	M	Yes
M			
M	Yes		
M			
M			
M			
M			
PK	Yes	M	Yes
M	Yes		
PK	Yes	M	Yes
M	Yes		
M			
M			
M			
M	Yes		
M			
M			
M			

**V. Employability Skills**

- A. Job-seeking
  - 1. Identifies employment opportunities
  - 2. Applies employment-seeking skills
  - 3. Interprets employment capabilities
  - 4. Prepares a resume
  - 5. Interviews for employment
- B. On-the-job
  - 1. Follows company policies and procedures
  - 2. Understands personal corporate benefits
  - 3. Maintains safe and healthy environment
  - 4. Maintains businesslike image
  - 5. Participates as a member of a team
  - 6. Works with a minimum of supervision
  - 7. Willingly accepts routine or repetitive tasks and performs them well
  - 8. Demonstrates courtesy
  - 9. Works with diversity (works well with men and women from diverse backgrounds and of varying ages)
  - 10. Demonstrates flexibility
    - a. Adapts to change
    - b. Demonstrates ability to identify the need for change
    - c. Adjusts to emergency situations
  - 11. Meets timelines/deadlines
  - 12. Demonstrates neatness in work produced and work environment
  - 13. Initiates in identifying a problem/issue and takes appropriate action
  - 14. Understands the corporate mission and own role in organization
  - 15. Understands quality concepts, tools and principles

**VI. Personal Qualities**

- A. Responsibility (exerts a high level of effort and perseveres towards goal attainment)
- B. Self-esteem (believes in own self-worth and maintains a positive view of self)
- C. Sociability (demonstrates understanding, friendliness, adaptability, empathy, and politeness in group settings)
- D. Self-management (assess self accurately, sets personal goals, monitors progress, and exhibits self-control)
- E. Integrity/honesty (chooses ethical courses of action)
- F. Enthusiasm
- G. Willingness to learn

# LEARNING OBJECTIVES, STANDARDS AND EVALUATION METHODS CAREER PREPARATION INITIATIVE IN FINANCIAL SERVICES

## BASIC ACADEMIC SKILLS

1. **Reading.** The student locates, understands, and interprets written information in prose and documents by identifying explicitly stated facts, drawing accurate inferences, and formulating appropriate generalizations necessary to perform college-level work.
2. **Writing.** The student writes thoughts, ideas, information, and messages by using correct grammar, spelling, capitalization, and punctuation and structuring sentences and paragraphs appropriately, organizing main and subordinate ideas, and recognizing basic writing conventions as measured by a grade of "B" or better in college English 101 (Composition I) or a "C" or better in college English 105 (Business Writing).
3. **Speaking.** The student communicates thoughts, ideas, information, and messages orally by speaking fluent standard English with individuals or groups and using appropriate behaviors such as eye contact, posture, and gestures as measured by a minimum grade of "B" in college Speech 101 (Fundamentals of Speech Communication) or a "C" or better in college Speech 160 (Business and Professional Speech).
4. **Math.** The student demonstrates computational skills and knowledge of basic mathematical functions (adding, subtracting, multiplying, and dividing whole numbers, decimals and fractions; computing percents; and interpreting charts and graphs) by choosing appropriately from a variety of mathematical techniques to solve practical problems as measured by a "C" grade or better in a college-level intermediate algebra class or a higher level math class.

## THINKING SKILLS

5. **Problem-Solving.** The student recognizes problems and devises and implements plans of action by writing short papers, answering essay questions, and analyzing case studies in group discussions, role playing, and simulations in the classroom and through monthly evaluations by workplace supervisors.
6. **Decision-Making.** The student makes decisions by defining goals and obstacles, generating and evaluating alternatives, and choosing the best plan of action by writing short papers, answering essay questions, and analyzing case studies in group discussions, role playing, and simulations in the classroom and through monthly evaluations by workplace supervisors.
7. **Learning.** The student evaluates efficient learning techniques and uses them to acquire and apply new knowledge and skills by successfully completing a series of workshops on learning styles.

## GENERAL VOCATIONAL SKILLS

8. **Information Processing.** The student demonstrates understanding of information processing by correctly identifying a variety of methods and formats for organizing information/data, efficiently organizing data for entry, accurately entering and storing documents and files, correctly printing and distributing information, and checking documents for spelling, grammar, and accuracy as measured by a "C" grade or better in required course(s) and the satisfaction of the workplace supervisor.

9. **Basic Computer Operations.** The student demonstrates understanding and application of basic microcomputer concepts and operations by entering, editing, and storing data in appropriate formats as measured by a "C" grade or better in the required course(s).
10. **Spreadsheet Software.** The student applies basic concepts and knowledge of spreadsheet software by modifying existing spreadsheets, creating formulas and new spreadsheets, and printing the spreadsheet with two or fewer minor errors according to specified formats and parameters provided by the instructor or workplace supervisor.
11. **Database Software.** The student applies basic concepts and knowledge of database management software by modifying existing databases, creating new ones, and printing reports with two or fewer minor errors according to specified formats and parameters provided by the instructor or workplace supervisor.
12. **Keyboarding.** The student has keyboarded at 40 words per minute with a maximum of three errors on a three-minute timed writing.
13. **Processes Mail.** The student sorts, prioritizes and routes a variety of incoming and outgoing mail and describes the various procedures for sending outgoing mail (e.g. UPS, Federal Express, messenger service) to the satisfaction of the workplace supervisor.
14. **Business Etiquette.** The student displays a cooperative, helpful attitude by greeting visitors/clients, making introductions, escorting them appropriately, and offering assistance resulting in visitor/client satisfaction on an ongoing basis to the satisfaction of the workplace supervisor.
15. **Telecommunications.** The student performs telecommunications activities by demonstrating basic knowledge of telephone functions, exhibiting proper telephone etiquette and procedures, taking and leaving clear and coherent voice mail messages, and correctly preparing documents to be faxed on an ongoing basis to the satisfaction of the workplace supervisor.
16. **Office Equipment.** The student displays familiarity with basic office equipment by identifying, using, and performing simple maintenance on a 10-key calculator, photocopying machine, micro-computer printer, typewriter, fax machine, and multi-line telephone to the satisfaction of the workplace supervisor.
17. **Filing.** The student demonstrates filing skills by establishing an alphabetic, geographic, subject, and numeric filing system and retrieving materials from these systems as measured by a passing grade in a filing test in an office procedures class.
18. **Written Business Communication.** The student creates mailable business documents by generating business letters, memoranda, research themes, formal business reports, meeting minutes, simple procedural documents, job descriptions and performance evaluations in clear and grammatically correct writing which effectively uses business vocabulary and proper formats to the satisfaction of the workplace supervisor.
19. **Oral Business Communication.** The student delivers effective oral business communication by making recommendations to supervisors and co-workers, giving directions clearly and concisely in routine and pressure situations, responding appropriately to nonverbal or implied communication, speaking tactfully, and not using slang as evaluated by the workplace supervisor.
20. **Trains Employees.** The student effectively orients his/her peers to their job duties as measured by a satisfactory evaluation by the workplace supervisor.

21. **Customer Relations.** The student demonstrates effective customer relations skills by establishing a positive rapport with customers, offering options/alternatives to meet a customer's needs, referring customers to appropriate departments, and resolving misunderstandings and conflicts or referring the problem on as measured by customer and workplace supervisor satisfaction on an ongoing basis.

## **INDUSTRY-SPECIFIC KNOWLEDGE AND SKILLS**

22. **General Business Concepts.** The student demonstrates proficiency in basic concepts of general business organization; economics; marketing, sales and distribution; management; personal investment fundamentals; and business law by achieving a minimum cumulative 2.5 grade point average in academic courses covering these areas.
23. **Financial Services Concepts.** The student demonstrates understanding of the financial services industry by describing the basic function and operations of the finance, insurance, real estate, brokerage, and accounting sectors and identifying career opportunities in each sector as measured by a "C" grade or better in an Introduction to Business class.
24. **Accounting/Bookkeeping.** The student understands basic accounting principles by recording entries in journals and ledgers according to generally accepted accounting principles as measured by a "C" grade or better in an accounting fundamentals class.
25. **Vocational Area.** The student demonstrates understanding of technical terminology, basic operations, and if appropriate, relevant information sources for research purposes for a specific vocational area as measured by the satisfaction of the teacher and workplace supervisor on his/her summary report on each workplace experience.

## **EMPLOYABILITY SKILLS**

26. **Consumer Economics.** The student incorporates the principles of sound consumer economics by developing a workable personal budget which reflects a realistic salary as measured by a passing grade on his or her budget project.
27. **Job-Seeking.** The student demonstrates effective job-seeking skills by identifying employment opportunities, applying employment-seeking skills, and interpreting employment capabilities as evaluated by interviewer(s) for work placements.
28. **On-the-Job.** The student exhibits sound on-the-job practices by demonstrating appropriate work behavior, attendance, and punctuality; accurately completing forms; understanding personal corporate benefits; maintaining a safe and healthy environment; maintaining a businesslike image; and demonstrating flexibility as measured by a satisfactory evaluation by the student's workplace supervisor.

## **PERSONAL QUALITIES**

29. The student displays desirable attitudes including responsibility, self esteem, sociability, self management, integrity, honesty, enthusiasm, and a willingness to learn by satisfactorily completing the prescribed coursework and work-based learning experiences required through the Career Preparation Initiative with a minimum cumulative grade point average of 2.5 and adhering to the program's social and academic policies.

## **CAREER PREP EDUCATIONAL PHILOSOPHY**

The Career Preparation Initiative in Financial Services is designed to provide students with both career competencies in the financial services industry and a foundation of basic academic skills, emphasizing thinking skills, decision-making skills, and communication skills. Through this joint venture between business and our schools, personal qualities leading to professional success are developed and the student is prepared for employment, a professional career, and continuing education.

This education is effectively developed and delivered only through a genuine partnership at all levels between the educational and employer communities. Both demonstrate their commitment to this educational approach by identifying and delivering essential responsibilities and resources.

Within the educational community, the secondary and post-secondary partners are committed to delivering a quality educational program. The curriculum is articulated so that students are provided with a "seamless" or continuous education. Technical and academic curricula are integrated throughout, with a focus on thinking skills to empower students to actively construct knowledge for themselves. Cooperative problem-solving is also essential, and students learn the importance and benefits of teamwork and interpersonal skills.

A representative cross-section of the financial services community identifies and endorses career competencies which support and complement the educational partnership. These competencies are measurable, and student achievement toward them is assessed at regular intervals. Periodic internships in financial services companies allow students to learn skills in the context of real problems. Internships are sequenced so as to build upon the preceding work experience and are integrated into the total curriculum.

Teachers and workplace supervisors are equipped with the knowledge and skills needed to make this program successful. To this end, they work with the employer and educational communities in identifying and securing the resources they require to develop and provide a quality educational program.

## **CAREER PREPARATION INITIATIVE - FINANCIAL SERVICES PROPOSED ACADEMIC AND SOCIAL POLICY**

To encourage the development of desirable attitudes and job behaviors on the part of students in the Career Preparation Initiative in Financial Services (CPI-FS) such as responsibility, self-esteem, sociability, self management, integrity, honesty, and a willingness to learn, the following academic and social guidelines are recommended.

### **To remain a student in good standing:**

- 1) 95% of all assignments are completed;
- 2) 90% of all classes are attended;
- 3) dress and grooming codes are followed; and
- 4) a cumulative grade point average of 2.5 in CPI-FS classes is maintained after the first semester in high school and college.

Students are withdrawn for violations of disciplinary policy of participating educational institutions, including but not limited to cheating, theft, fighting, or excessive tardiness or absenteeism. Students' academic performance will be reviewed periodically and academic probation will occur if improvement is not made within the specified timeframe.

All students are to review this policy with a program administrator or faculty member and sign a form indicating their understanding and agreement to abide by its terms.

**Career Preparation Initiative -- Financial Services  
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**CPI-FS CURRICULUM COMMITTEE**  
**Scope of Work and Assignments**

1. Review existing programs of study and course outlines for the Chicago Academy of Finance at the high school and community college levels to determine:
  - a. where learning objectives are addressed (by class and within course outline)
  - b. identify which, if any, objectives are not addressed
  - c. recommend new classes to address these objectives
  - d. recommend substitution of classes which do not address objectives
  - e. recommend changes to course outlines
  - f. recommend timing and programming for three work-based learning experiences

C. Brown, D. Brownstein, C. Franz, R. Johnson, M. McPherson
  
2. Develop a work-based learning component which identifies specific, measurable objectives to be addressed by students' supervisors and assessment instruments for each of the three work experiences. Also recommend appropriate training, training resources, timetable and materials for supervisors.
 

J. Lombard
  
3. Recommend teacher training/development activities, methods, resources and timetable at the high school and college levels.
 

Entire Committee
  
4. Write an academic philosophy describing our targeted student.
 

Entire Committee
  
5. Develop a student portfolio assignment that will span the entire four year program and reflect individual growth and mastery of many of the CPI-FS competencies. A work journal should be incorporated into this and at least one face-to-face student evaluation should be included.
 

Entire Committee
  
6. Identify external resources and internal/external support needed to achieve curriculum-related products described above.
 

Entire Committee

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Chicago Public Schools

REQUEST FOR PROPOSAL  
MARKETING MATERIAL FOR THE CAREER PREPARATION INITIATIVE  
CITY COLLEGES OF CHICAGO

April 1, 1992

**I. Purpose of Project**

A new model of business education is being developed through a collaboration of the City Colleges of Chicago, the Chicago Public Schools, and a cross-section of employers in Chicago's financial services industry. This effort, named the Career Preparation Initiative - Financial Services (CPI-FS), is based upon the European apprenticeship approach to education which involves the employer in teaching relevant skills to students and uses objective performance measures to assess student mastery of these skills.

As envisioned by the 37-member CPI-FS working committee or "Implementation Team," the proposed program would consist of a four-year curriculum which takes the student from the 11th and 12th grades of high school through a two-year associate degree program at a community college. Students would be taught the academic and vocational skills identified by employers as necessary for a successful career in banking, insurance, real estate, accounting, commodities/securities/brokerage, and other financial service sectors. Learning would occur not only in the classroom but in the workplace, and employers will be asked to provide each student with several work-based learning opportunities throughout their four-year education.

The success of this project will depend upon employer involvement. Many types of employer commitments will be required, ranging from providing quality student and teacher internships to hiring students for entry-level positions. To this end, effective employer recruitment material must be developed which communicates the importance of this project to the business community and persuades key corporate decision-makers to commit needed resources to CPI-FS.

Five (5) copies of the proposal and the attached bid forms must be signed, enclosed in a sealed envelope, and sent to the City Colleges of Chicago, Office of Purchasing, Room 1241, 226 West Jackson Boulevard, Chicago, IL 60606-6998 by 12:00 noon, on Monday, April 20, 1992. Proposals received after than time will not be considered. Please note that the City Colleges of Chicago will be closed on April 16 and 17, 1992.

For additional information, call Ms. Diana Robinson, Director of the Chicago Academy of Finance, Harold Washington College, 312/855-8127.

**II. Scope of Services**

Professional marketing/public relations services are being sought for the development of audio-visual and printed material to recruit employer involvement in the Career Preparation Initiative - Financial Services. The consultant will provide the following services:

**Task 1:** Preparation of a reproducible audio-visual presentation which speaks to the effectiveness of the CPI-FS approach to workforce preparation and the benefits of employer involvement. This would be presented to senior financial services executives by a marketing team of CPI-FS representatives.

**Task 2:** Preparation of a written brochure reinforcing the key message points conveyed in the above material which could be left behind and distributed internally. This brochure should be a basic "stand alone" information piece and appropriate for distribution to the general business community. The consultant will provide camera-ready copy of this material.

**Task 3 (Optional):** Preparation of a written brochure targeted to potential students of the CPI-FS program and their parents. This brochure would describe the program, highlight its unique features, and emphasize the educational benefits to students. Camera-ready copy of this material would be provided.

**Task 4:** Two presentations to the CPI-FS Implementation Team: one to the sub-committee overseeing this project; and a second to the full CPI-FS Implementation Team.

### III. Preparation of Proposal

All costs incurred in the preparation of proposals shall be borne by the vendor.

Oral explanations or instructions given before the award of the contract will not be binding. Any information given to a prospective vendor concerning the request will be furnished to all prospective vendors as an addendum to the RFP, if such information is necessary to vendors in submitting offers on the solicitation, or if the lack of such information would be prejudicial to the uninformed vendors.

Each proposal shall include a letter of transmittal which bears the signature and title of an authorized representative of the vendor. The letter shall indicate that the vendor's proposal is a firm offer for sixty (60) days and that the vendor shall comply with the terms of the RFP. The letter shall also indicate the existence and nature of any contemplated subcontractor relationship.

The proposer may designate those portions of the proposal which contain trade secrets or other proprietary data which shall be treated as confidential.

The proposal shall contain, as a minimum, the following information.

1. Background of firm.
2. Demonstrated capability to perform task (list of clients for whom similar materials have been prepared in the past is preferred).
3. Cost by task as described in the scope of work.

### IV. Project Schedule and Budget

It is expected that work would commence May 11, 1992. All work must be completed by June 30, 1992. A \$15,000 budget is available for all services associated with this project.

#### V. Evaluation Criteria

City Colleges of Chicago will select a contractor on the basis of the responsiveness of the proposal to the RFP requirements and the vendor's willingness to negotiate and execute an acceptable written agreement. City Colleges of Chicago reserves the right to reject any, some, or all proposals, and to request written clarification of proposals and supporting materials.

All submittals will be evaluated according to the following criteria:

- 14 a) the proposer's demonstrated experience in developing similar materials;
- 10 b) the quality of references which the proposer receives;
- 20 c) the overall quality of the proposal submitted;
- 13 d) the qualifications of key personnel committed to the project;
- 20 e) the organization of the process of accomplishing the project as outlined in the scope of services;
- 10 f) the cost of completing the project as defined in the proposal and any subsequent negotiations.

#### VI. Contract Award

City Colleges of Chicago reserves the right to negotiate with more than one potential awardee after the submission of all proposals. The successful proposer will be required to enter into a contract with City Colleges of Chicago, which incorporates as part of the contract this RFP and the proposer's response to the RFP.

#### VII. Appendix

- a. Proposers must comply with all laws, ordinances, regulations and codes of the federal, state, and city governments which may in any way affect the preparation of proposals or the performance of the contract. Proposers must also comply with the Board Rules of the City Colleges of Chicago.
- b. Time is of the essence in all matters regarding proposals.
- c. City Colleges of Chicago has absolute discretion with regard to acceptance and rejection of proposals.
- d. False statements in proposals will disqualify the proposal.
- e) In order to be considered, the party submitting a proposal waives the right to bring legal proceedings challenging the Board's choice of the award proposal.

## BID FORMS

### Schedule of Bid Documents to be submitted

The following schedules document compliance with the Board of Trustees Minority/Women Contract Participation Plan. Schedules A, B, and C must be submitted with a bid or proposal. Schedule D is used to monitor compliance after a contract is awarded. All forms must be completed and submitted with the proposal sheet in the pink bid envelope.

#### **M/WBE Schedule A - Compliance Proposal and Affidavit**

Part I requests information regarding the status of the bidder/proposer. Particular attention should be given to the required attachments because failure to attach the documents may void the bid.

Part II should be completed by any bidder/proposer who intends to utilize a M/WBE subcontractor or supplier. Only those subcontractors and suppliers that the bidder/proposer is committed to using on the City Colleges of Chicago contract should be included.

Part III should be completed only if the bidder/proposer intends to enter into a joint venture with an M/WBE for this particular contract. Bidder/proposers not entering joint ventures need not complete this section.

Part IV is a summary of M/WBE participation which should be completed by all bidder/proposers regardless of the extent or type of participation. After the award on the contract changes from the information included in this schedule will not be permitted without the approval of City Colleges of Chicago.

#### **M/WBE Schedule B -**

**Letter of Intent from M/WBE to Perform as Subcontractors, Supplier, or Joint Venture**

Bidder/proposers must attach a completed Schedule B for each M/WBE listed in Schedule A. Schedule B must be completed and signed by the M/WBE, not by the bidder/proposer. A bidder/proposer which is a M/WBE need not complete Schedule B for itself, but must include Schedule B's for any other proposed M/WBE participant in the contract. If a fully completed and executed Schedule B is not submitted with the bid, it must be received by the Office of Contract Compliance within five business days after the bid opening. All post-bid submissions must have the original signatures on all documents.

#### **M/WBE Schedule C - Request for Waiver**

Schedule C must be completed by any bidder/proposer submitting a bid which does not meet the Board's requirements of 17% MBE and 7% WBE participation.

The waiver request must establish by clear and convincing evidence that full compliance with MBE or WBE requirements is not possible or is economically unreasonable under the circumstances. The waiver request must be submitted with written documentation demonstrating your "Good Faith Efforts" to comply with the M/WBE Special Conditions.

#### **M/WBE Schedule D - M/WBE Progress Report**

Schedule D is used to report compliance with the M/WBE requirements of the contract following award of a contract. It need not be submitted as part of a bid or proposal.

M/WBE Schedule A - M/WBE Compliance Proposal and Affidavit

The bidder/proposer shall satisfy the M/WBE participation goals applicable to this contract through one or more of the following means.

I. MBE or WBE Bidder/Proposer.

- 1. Is the bidder/proposer an MBE? Yes \_\_\_\_\_ No \_\_\_\_\_
- 2. Is the bidder/proposer a WBE? Yes \_\_\_\_\_ No \_\_\_\_\_  
(If the answers to questions 1 and 2 are both "No," skip down to Part II and do not answer the remainder of Part I).
- 3. Is the bidder/proposer certified as an MBE or a WBE by the Purchasing Department of the City of Chicago? Yes \_\_\_\_\_ No \_\_\_\_\_  
(If "Yes," attach a copy of the City of Chicago Letter of Certification)
- 4. Does the bidder/proposer have a current application for certification pending with the Purchasing Department of the City of Chicago? Yes \_\_\_\_\_ No \_\_\_\_\_
- 5. Has bidder/proposer ever applied to the Purchasing Department of the City of Chicago for certification as an MBE or WBE? Yes \_\_\_\_\_ No \_\_\_\_\_  
(If "No," skip question number 6 and go on to question number 7).
- 6. Has the Purchasing Department of the City of Chicago ever rejected an application for certification as an MBE or WBE filed by bidder/proposer? Yes \_\_\_\_\_ No \_\_\_\_\_  
(If "Yes," explain the circumstances on separate sheet).
- 7. Had bidder/proposer identified himself or herself as a minority or women-owned business as of the effective date of this Plan through the Purchasing Department of City Colleges' form for Disclosure of Minority or Women Ownership or through some other form provided by the Purchasing Department of City Colleges? Yes \_\_\_\_\_ No \_\_\_\_\_  
(If "Yes," attach a copy of the completed form for Disclosure of Minority or Women Ownership).

II. MBE AND WBE SUBCONTRACTORS AND SUPPLIERS.

(The subcontractor or supplier can only be counted as either an MBE or a WBE, never as both)



Schedule A - Cont'd

1. Name of M/WBE: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

MBE \_\_\_\_\_ VBE \_\_\_\_\_ (check one)

Dollar Amount of Participation: \$ \_\_\_\_\_

Percent of Participation: % \_\_\_\_\_

Describe the subcontracting work or supplies the M/WBE will provide: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Name of M/WBE: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

MBE \_\_\_\_\_ VBE \_\_\_\_\_ (check one)

Dollar Amount of Participation: \$ \_\_\_\_\_

Percent of Participation: % \_\_\_\_\_

Describe the subcontracting work or supplies the M/WBE will provide: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Name of M/WBE: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

MBE \_\_\_\_\_ VBE \_\_\_\_\_ (check one)

Dollar Amount of Participation: \$ \_\_\_\_\_

Percent of Participation: % \_\_\_\_\_

Schedule A - Cont'd

Describe the subcontracting work or supplies the M/WBE will provide: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Name of M/WBE: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

MBE \_\_\_\_\_ WBE \_\_\_\_\_ (check one)

Dollar Amount of Participation: \$ \_\_\_\_\_

Percent of Participation: % \_\_\_\_\_

Describe the subcontracting work or supplies the M/WBE will provide: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Name of M/WBE: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

MBE \_\_\_\_\_ WBE \_\_\_\_\_ (check one)

Dollar Amount of Participation: \$ \_\_\_\_\_

Percent of Participation: % \_\_\_\_\_

Describe the subcontracting work or supplies the M/WBE will provide: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Attach additional sheets as needed.

III. JOINT VENTURES

1. Is the bidder/proposer a joint venture? Yes      No       
 (If "No," do not answer the remaining questions in this Part III).
2. Specify the respective percentages of ownership and control of each co-venturer.

Co-Venturer	(Check one)		% of Ownership and Control
_____	MBE <u>    </u>	WBE <u>  </u> %	_____
_____	MBE <u>    </u>	WBE <u>  </u> %	_____
_____	MBE <u>    </u>	WBE <u>  </u> %	_____
_____	MBE <u>    </u>	WBE <u>  </u> %	_____
_____	MBE <u>    </u>	WBE <u>  </u> %	_____

Each MBE and WBE co-venturer must attach to this Schedule a copy of his or her Letter of Certification from the Purchasing Department of the City of Chicago, or a copy of his or her pending application for certification by the Purchasing Department of the City of Chicago, or a copy of his or her form for Disclosure of Minority or Women Ownership submitted to the Purchasing Department of City Colleges.

3. State the dollar amount of participation and the percentage of participation of each MBE or WBE co-venturer.

MBE Co-Venturers	Dollar Amount of Participation	Percentage of Participation
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____

Schedule A - Cont'd

WBE Co-Venturers	Dollar Amount of Participation	Percentage of Participation
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____

IV. SUMMARY OF MBE AND WBE PARTICIPATION.

MBE Firm Names	Dollar Amount Of Participation	Percentage of Participation
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
<b>Total MBE Participation</b>	<b>\$ _____</b>	<b>% _____</b>

WBE FIRM NAMES	Dollar Amount of Participation	Percentage of Participation
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
_____	\$ _____	% _____
<b>Total WBE Participation</b>	<b>\$ _____</b>	<b>% _____</b>



Schedule A - Cont'd

I solemnly declare and affirm under penalty of perjury that the facts contained in this document are correct, that no material fact has been omitted, and that I am authorized on behalf of the contractor to make this affidavit.

SIGNATURE OF AFFIANT: \_\_\_\_\_

TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_

FIRM NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

**M/WBE Schedule B**

**Letter of Intent from MBE/WBE to Perform As Subcontractor, Supplier and/or Consultant**

To: \_\_\_\_\_ and the City Colleges of Chicago. (Name of Contractor, Bidder/Proposer)

The MBE/WBE intends to perform work in connection with the above project as a: \_\_\_\_\_ Subcontractor \_\_\_\_\_ Joint Venture \_\_\_\_\_ Supplier

The MBE/WBE status is confirmed by:

\_\_\_\_ Letter of certification from the City of Chicago.

\_\_\_\_ Copy of pending certification application with the City of Chicago.

\_\_\_\_ City Colleges' form for Disclosure of Minority or Women Ownership.

The undersigned is prepared to provide the following services or supplies in connection with the above referenced contract: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

List the dollar amount of participation and the payment schedule for the above-described services: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Attach additional sheets if needed to fully describe the M/WBE's proposed scope of work and /or payment schedule.

The undersigned will enter into a formal agreement for the above reference contract with the Bidder within (5) five working days of The Bidder/Proposer's receipt of a signed contract from City Colleges.

I solemnly declare and affirm under penalty of perjury that the facts contained in this document are correct, that no material fact has been omitted, and that I am authorized on behalf of the contractor to make this affidavit.

SIGNATURE OF AFFIANT: \_\_\_\_\_

TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_

FIRM NAME: \_\_\_\_\_ MBE: Yes \_\_\_\_\_ No \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

M/WBE Schedule C - Request for Waiver

The bidder/proposer respectfully requests a waiver of the MBE or WBE goals applicable to this contract.

1. The MBE goal applicable to this contract is 17 %; the WBE goal applicable to this contract is 7 %.
2. The bidder/proposer commits to achieve      % MBE participation and requests waiver of the remaining      % of the MBE goal.
3. The bidder/proposer commits to achieve      % WBE participation and requests waiver of the remaining      % of the WBE goal.
4. Describe in detail with supporting documentation, why despite good faith efforts the M/WBE goals in this contract cannot be met. Particular attention should be given to Section VIII of the Plan concerning waivers and the need to explain why it is not economically feasible to meet the applicable goals.

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I solemnly declare and affirm under penalty of perjury that the facts contained in this document are correct, that no material fact has been omitted, and that I am authorized on behalf of the contractor to make this affidavit.

SIGNATURE OF AFFIANT: \_\_\_\_\_

TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_

FIRM NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

## CEOs PARTICIPATING IN CPI-FS VIDEO

Mr. Milton Davis  
Chairman of the Board  
South Shore Bank  
7054 South Jeffery Boulevard  
Chicago, IL 60649

Mr. Charles Doherty  
President and Chief Operating Officer  
Midwest Stock Exchange  
440 South LaSalle Street  
Chicago, IL 60605

Mr. S. Martin Hickman  
Chairman and Chief Operating Officer  
Blue Cross/Blue Shield of Illinois  
233 North Michigan Avenue  
Chicago, IL 60601

Mr. Henry G. MacMorran  
President and Chief Operating Officer  
LaSalle Bank Lakeview  
3201 North Ashland  
Chicago, IL 60657

Mr. Wilbert A. Thiel  
President and Chief Operating Officer  
The Chicago Corporation  
208 South LaSalle Street  
Chicago, IL 60604

B. Kenneth West  
Chairman and Chief Executive Officer  
Harris Trust and Savings Bank  
111 West Monroe Street  
Chicago, IL 60690

## **TALKING POINTS AND INTERVIEW QUESTIONS FOR CEOs CAREER PREPARATION INITIATIVE - FINANCIAL SERVICES VIDEO PROJECT**

### **Talking Points**

- **Quality of the American worker: too many new workers are unqualified for entry level jobs. By forming partnerships with education we can begin to remedy this.**
- **Responsibilities of employers may have to include more involvement in the education of our young people by providing increased exposure to the workplace, hands-on training, and support of relevant education to prepare youth for entry into the workplace.**
- **The gap between what the educational system is providing and what the business community is getting needs to be filled. One remedy is to have the two major players — education people and business people — work together.**
- **Human resource managers from the financial services industry have taken the initiative in this program by contributing to the curriculum and laying the groundwork necessary for mutual accountability and responsibility. We now need to commit meaningful internships, work supervisors, and training personnel to the students who qualify for the Career Preparation Initiative program.**
- **The apprenticeship model upon which the program is based depends on the commitment and interest of an older generation. By providing expanded internships and workbased learning opportunities, the experience of seasoned workers is passed on to new workers through hands-on work, through the personal relationships which develop, and through daily involvement on the job.**
- **A crucial point here is the structured relationship that has formed among financial service employers, the Chicago Public Schools, and the City Colleges of Chicago. By creating this program together, we know what the other is doing, the students are learning relevant skills, and, for the first time, there is a sense of ownership in this program by all three sectors through their hands-on participation in developing the Career Preparation Initiative.**

## **Interview Questions**

**Why are you committing resources to the Career Preparation Initiative - Financial Services (CPI-FS)?**

**Describe what you see happening to the American workforce.**

**How does the CPI-FS address your concerns about the workforce?**

**How would you define the role of an employer? How has this role changed?**

**Address the concerns that the business world, specifically the financial services industry, has about the quality of education.**

**You are addressing a peer, a CEO at a major corporation. Tell this CEO why he/she should commit resources to this program.**

## Video on the CPI-FS Program

### Overview

#### *Purpose*

**What do we want from the viewers at the end of the video?**

We want them to want to know more; we want their interest piqued, their curiosity aroused, and we want them to have a feeling that this program, out of the many programs offered through many schools and agencies, could work, especially if they--the viewers--become involved. We want them to know that they, their businesses, our city, and our youth will benefit from being involved.

#### *Tone*

**What kind of tone would best propel the video?**

Professional. A sense of potential. Serious. Pace and power. Committed people. A sense of the impact the program can have. Different. Unique. Sense of mutual responsibility.

#### *Point of View*

**Who is presenting the information in the video?**

People who are tops in the field: CEOs, Chairman of the Board of City Colleges of Chicago

People who are tops in the program: Principal at Jones, representatives from the I-team, teachers

People who would end up working closely with the program: students from Jones, human resource professionals in the financial service industry

People who would benefit from the program: every speaker, from the CEO to the students at Jones

### What the Viewers Will Know After Watching the Video

#### Point 1

•That the CPI-FS program is a unique partnership between education and employers with incredible potential to effect change in the quality of our workforce but that the potential will only be realized if there is "top down" participation from industry leaders.

- That the employer has a mandate to invest in the American workforce now, and that this program is a strategic, long-term investment
- That without this type of investment, we as a country will continue to suffer in the international marketplace and continue to waste the major human potential of our youth

Narrative Strategies to address this point:

- Statements and "buy-ins" from CEOs and respected representatives from all parts of the partnership. CEOs talking about their vision of future of the industry
- Statement from human resource professional on the present quality of the workforce, something like, "What we have is people who are applying for entry level jobs who are not qualified, who don't have what it takes. What we need are job applicants who have the basic skills and who are eager to learn. With this program we'll get this and more-  
-we'll have applicants familiar with the industry who have been taught using a curriculum that we helped design and implement."
- CEOs talking about opening the doors to innovation, to new ways of thinking about education, to embracing an apprenticeship model of education and training

Visual Strategies:

- quick workplace shots
- head shots of speakers, wide shots on office

## Point 2

- That the CPI-FS program is different from any regular education and training program in the Chicago Public Schools or City Colleges of Chicago
- That the CPI-FS program will improve the reputation of CPS and City Colleges of Chicago

Narrative Strategies:

- Show Jones and its representatives: its principal, its teachers, its students
- Interview students who talk about their desire to make it, that what they want is a strong education and a program which provides exposure and opportunities to work and learn

•Appeal to pride in our city: no matter what William Bennett says, if we all are committed to quality, Chicago can have quality career preparation programs for our students.

**Visual Strategies:**

- good looking kids...kid in school clothes...kid in work clothes
- Jones and its classrooms in action

**Point 3**

•That the CPI-FS program will work, is unique, and is supported by a team of professionals unequaled in the nation

**Narrative Strategies:**

- Spokespersons from key people from the Implementation Team who have been involved from the beginning: Diana, Alex
- Ron Gidwitz as demonstration of top level commitment on the public side of this partnership and also speaking as a business leader and employer

**Visual Strategies:**

- shots of people in the workplace working in teams
- close ups...reaction shots....kids learning....on the job scenes

*Community Television Network, Video Services  
312.278.8500*

*Creative Team:  
Deb Ellis  
Chris Kowalke  
Chris Bayard*

# Education is Everyone's Business

**I**f we don't invest in our future workforce now, who will...and when?"

Ronald Gidwitz, President, Chief Executive Officer, Helene Curtis, Inc.  
Chair, City Colleges of Chicago

**W**e want workers who can hit the ground running and this is one way to make sure this happens."

Bill Thiel, President, The Chicago Corporation

**W**hen students are given high standards, excellent teachers, and good internships, they strive, they learn, they work hard, and...they will succeed."

Dr. Cozette Buckney, Principal,  
Jones Metropolitan High School of  
Business and Commerce

**S**ure, the educational system can work in isolation, but it works better when business is involved."

S. Martin Hickman, Chair, CEO,  
Blue Cross Blue Shield of Illinois

This brochure was funded by the John D. and Catherine T. MacArthur Foundation.

The Career Preparation Initiative is a Tech Prep Program of the Illinois State Board of Education  
Louis Mervis, Chairman  
Robert Leiminger, State Superintendent

NOTE: copy is not in position  
of final brochure.

## Business and education working together in the Career Preparation Initiative

Blue Cross Blue Shield of Illinois  
Chicago Academy of Finance  
Chicago City-Wide College  
The Chicago Corporation  
The Chicago Institute for Training and Development  
City of Chicago Department of Planning and Development  
Chicago Public Schools  
City Colleges of Chicago  
F.J. Williams Realty  
First National Bank of Chicago  
The Civic Committee of the Commercial Club of Chicago  
Harold Washington College  
Harris Trust and Savings Bank  
Illinois Department of Commerce and Community Affairs  
ITT Hartford  
Jones Metropolitan High School of Business and Commerce  
Kemper Financial Services, Inc.  
LaSalle National Bank  
LaSalle Bank Lakeview  
Midwest Stock Exchange, inc.  
North American Company for Life and Health Insurance  
The Northern Trust Company  
The Peoples Gas, Light and Coke Company  
The Prudential Realty Group  
South Shore Bank  
LaSalle Talman Bank  
Title Services, Inc.  
University of Illinois at Chicago

## **An invitation to participate in the Career Preparation Initiative in Financial Services...**

Responding to the urgent need for more qualified entry-level workers and based on the belief that business involvement in education is a crucial element in creating a strong workforce, the *Career Preparation Initiative in Financial Services* (CPI-FS) has been created by a partnership among financial service companies, the Chicago Public Schools, and the City Colleges of Chicago.

Directly addressing the human resource needs of the financial services industry, the Career Preparation Initiative in Financial Services is a 2 + 2 program: 2 years of academic and vocational training in high school and 2 years of college courses, with internships woven throughout the four years.

### **What your company will gain from participation in the Career Prep Initiative:**

- Input into the education of these young adults throughout the four years of their involvement with CPI-FS
- Direct involvement in upgrading the workforce of tomorrow
- Full-time employees who are well-versed in your industry, have solid basic skills, and who are eager to learn
- Recognition as a leader in Chicago's educational reform

### **Your company can participate in the Career Prep Initiative by providing:**

- Student internships
- Financial subsidies
- Student participation in corporate training programs
- Student participation in career development training
- Job shadowing opportunities
- Teacher internships to provide up-to-date information on the workplace
- Mentors for students
- Corporate speakers for teaching in schools
- Full-time entry level jobs for CPI-FS graduates
- Tuition reimbursement enabling CPI-FS students to continue their education

## **What students in the CPI-FS are learning in the classroom and the workplace**

Representatives from financial service companies have been working with educators to create a realistic yet rigorous four year curriculum for students in the CPI-FS program.

The six basic areas of study are: basic academic skills, critical thinking, general vocational skills with an emphasis on customer and employee relations, industry-specific skills, employability skills, and personal qualities.

Within these basic areas, students will gain...

- A thorough overview of the financial services industry, its basic functions, and the special skills required by the business
- An integrated understanding of basic academic skills and workplace skills
- Knowledge of basic accounting and bookkeeping skills
- Problem solving skills with a special emphasis in the areas of customer relations and working effectively with others
- A firm grasp on employers' general expectations of employees, including dependability, honesty, initiative, enthusiasm, and ethical behavior

### **Interested? Call or write for more information:**

Diana Robinson  
Director, Career Preparation Initiative in Financial Services  
30 East Lake St., Suite 1105  
Chicago, Illinois 60601  
312-984-2775

ATTACHMENT N

**CHICAGO AF**  
**ACADEMY OF FINANCE**

**JONES METROPOLITAN HIGH SCHOOL  
OF  
BUSINESS AND COMMERCE**

Introduces the New

**CHICAGO ACADEMY OF FINANCE**

for

**High School Juniors and Seniors**

**Jones Metropolitan High School  
606 South State Street  
Chicago, IL 60605**

**A Program of the National Academy  
Foundation**

**and**

**A Tech Prep Program  
Illinois State Board of Education  
Department of Adult, Vocational  
and Technical Education**

## Chicago Business Program for Public School Students

The Chicago Academy of Finance (CAF) is a unique high school business program designed to help 11th and 12th grade students learn about Chicago's financial services industry both in the classroom and on-the-job.

CAF introduces students to the array of sectors comprising Chicago's world-class financial community: accounting, banking, securities and commodities exchanges, brokerage, insurance, and real estate.

## CAF Prepares Students for College or the Workforce

Students who successfully complete the CAF program at Jones Metropolitan High School are strongly encouraged to attend college to pursue their business studies. One option is a two-year Chicago Academy of Finance program offered at Harold Washington College for students interested in acquiring an Associate Degree. From there, students may transfer to a senior institution to obtain their baccalaureate degree.

Graduates of CAF at Jones Metropolitan High School are also qualified for a variety of entry-level positions throughout the financial services industry.

## Unique Features

A program of the National Academy Foundation, CAF is one of 45 finance academies across the United States. Several unique features characterize all Academies of Finance:

- *Specialized classes in finance developed by business experts.*
- *Paid summer internships after the 11th year of high school.*
- *College-level class experience in the senior year.*

- *Opportunities to establish personal contacts with professionals in the industry.*

## Intensive Academic and Vocational Preparation

Students accepted into CAF follow a two-year academic and vocational program. Following are the classes required for each year.

### Junior Year

World of Finance/Securities Operations

Typing I

Business English I

Electronic Business Procedures

Computer Math Fundamentals/Applications

High School Reading Improvement/Oral

Communications and Speech

Accounting I and II

Foreign Language

Physical Education

### Senior Year

Banking and Credit/Financial Planning

United States History

Business English II

College-Level Business Class

Foreign Language

Physical Education

## Special CAF Activities

Students enrolled in the Chicago Academy of Finance also participate in numerous special activities designed to further their understanding of the financial services sector. These include:

- Stock Market Game
- Speakers from the financial services industry
- Trips to local financial services companies
- Business skills workshops
- Exchange trips to other Academy of Finance schools (outside of Chicago)
- Special graduation ceremony (senior year)

## Local and National Business Resources

An Advisory Board consisting of senior executives in Chicago's financial services industry and local educators keeps the Chicago Academy of Finance up-to-date and relevant to today's workplace.

The National Academy Foundation (NAF) provides additional resources from a national perspective. NAF was established in 1982 to encourage and support partnerships between business and education to strengthen the preparedness of the American workforce. NAF provides professional development opportunities for teachers; a national network among students, teachers and business participants; and copyrighted curriculum material in financial services operations.

## The Academy of Finance Works!

Based on a national random survey of graduates from Academies of Finance, the following findings emerged:

- *92% of the program graduates reported that the Academy of Finance helped them to make concrete career decisions.*
- *90% said that the program prepared them for employment.*
- *95% of all graduates went on to college.*
- *68% of program graduates are working, and half of them in the financial services area.*
- *The Academy of Finance has proven an excellent vehicle for young women and minority youth to access nontraditional, well-paying jobs with career potential. These graduates performed as well in post-secondary education and employment outcomes as other youth in the program.*



**Eligibility Requirements**

Chicago high school student, whether in a private or public school, who has a "B" average and 95% attendance rate is eligible for CAF. To be accepted into the program you must complete the CAF application, interview with the CAF Coordinator at Jones Metropolitan High School, and sign a two-year agreement to follow the CAF program and its requirements. The student's parents must also sign a consent form.

**Limited Space - Apply Now!**

A limited number of students are accepted into the Chicago Academy of Finance. Applications are accepted year-round and are considered in the order of their receipt. Students are encouraged to apply early in their sophomore year. To receive an application form, complete the enclosed request form or contact:

Ms. Annie B. Miller  
Coordinator, Chicago Academy of Finance  
Jones Metropolitan High School  
606 South State Street  
Chicago, IL 60605  
(312) 534-8600

The Chicago Academy of Finance operates in partnership with these sponsoring companies:

- American Express
- Arthur Andersen & Co.
- Chicago Board Options Exchange
- Coopers & Lybrand
- Effective Management Technologies
- First National Bank of Chicago
- Ernst & Young
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Diana L. Robinson  
Director  
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Ms. Annie B. Miller, Coordinator  
Chicago Academy of Finance  
Jones Metropolitan High School  
606 South State Street  
Chicago, IL 60605

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**THE  
CHICAGO  
ACADEMY OF  
FINANCE**



*at*

**JONES METROPOLITAN HIGH SCHOOL  
OF BUSINESS AND COMMERCE**

**SALUTES**

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**APRIL 22, 1992**

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**SHEARSON LEHMAN BROTHERS  
BREAKFAST MEETING**

**MARCH 27, 1992**

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**SHEARSON LEHMAN BROS. BREAKFAST MEETING**

**MARCH 27, 1992**

**CHICAGO ACADEMY OF FINANCE  
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**CHARTER CLASS 1991 - 92**

**PROGRAM**

**INTRODUCTION OF PRINCIPAL**  
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*Cheryl Scott*

**WELCOME ADDRESS**  
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*Dr. Cozette Buckney*

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*Michael Skinner, Vice-President*  
*Al Thomas, Financial Consultant*

**MUSICAL SELECTION**  
*"You Save the Best for Last"*  
*Shanttii Wilson*

**RECOGNITION OF SPECIAL GUESTS**  
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*Annie Miller*

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#	VENITA LOCKETT	*# TAMARA WRIGHT

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FEBRUARY 26, 1992

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at

JONES METROPOLITAN HIGH SCHOOL  
OF BUSINESS AND COMMERCE

salutes

AMERICAN EXPRESS

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<b>JANUARY 29, 1992</b>		<b>TAMARA MCKENZIE</b>
<b>PROGRAM</b>		<b>EBONI MILLER</b>
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<b>AOF, Junior Class Secretary</b>		<b>TIMOTHY PARKER</b>
<b>CeEtter Carpenter</b>		<b>TEKENYA PEEK</b>
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<b>WELCOME ADDRESS</b>		<b>HUBERT PTAK</b>
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<b>James Mason, First Scholar</b>		<b>CHERYL ANN SCOTT</b>
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at

**JONES METROPOLITAN HIGH SCHOOL  
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salutes

**NORTHERN TRUST BANK  
BREAKFAST MEETING**

**DECEMBER 18, 1991**

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CHARTER CLASS 1991

**NORTHERN TRUST BANK BREAKFAST MEETING**

**DECEMBER 18, 1991**

**PROGRAM**

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*Latrese Hardnick*

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*Annie Miller*

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	LAKENA BOYD	# TIMOTHY PARKER
	CEETTER CARPENTER	# TEKENYA PEEK
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#	WILLIE CURRY	# HUBERT PTAK
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#	JACQUELYNE LITTLE	*# SHANTII WILSON
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JOSEPH ZALE - ECONOMICS

MERYL TILLERY - FRENCH  
ANNIE MILLER - COORDINATOR

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**COZETTE BUCKNEY**  
Principal  
Jones Metropolitan High School

**STEVEN CAPOUCH**  
Vice-President  
First National Bank of Chicago

**ALAN J. DEAN**  
Chief Financial Officer  
Chicago Board Options Exchange

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Executive Director-Productive Chicago  
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**JOHN M. KELLER**  
Partner  
Arthur Andersen & Co

**JOHN M. KISS**  
Partner  
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Associate Professor  
Chicago City-Wide College

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Vice-President  
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Assistant Superintendent  
Chicago Public Schools

Chicago Academy of Finance

**DIANA L. ROBINSON** - Program Director  
Harold Washington College

**CHICAGO ACADEMY OF FINANCE**

at

**JONES METROPOLITAN HIGH SCHOOL  
OF BUSINESS AND COMMERCE**

presents

**ACADEMY OF FINANCE AWARDS BREAKFAST**

**NOVEMBER 26, 1991**

Sponsored by:

**THE CHICAGO PUBLIC SCHOOLS**

in partnership with

**THE NATIONAL ACADEMY FOUNDATION**

and

**THE ADVISORY BOARD OF THE  
CHICAGO ACADEMY OF FINANCE**

# ACADEMY OF FINANCE AWARDS BREAKFAST

CHICAGO ACADEMY OF FINANCE  
JONES METROPOLITAN HIGH SCHOOL

## CHARTER CLASS 1991

NOVEMBER 26, 1991

### PROGRAM

**INTRODUCTION OF PRINCIPAL**  
AOF Junior Class President  
Adrienne Fariby

**WELCOME ADDRESS**  
Principal, JONES METROPOLITAN HIGH SCHOOL  
Cozette Buckney

### REMARKS

Donald E. Brown, Chairman  
CHICAGO ACADEMY OF FINANCE ADVISORY BOARD

Alan Dean, Chief Financial Officer  
CHICAGO BOARD OPTIONS EXCHANGE

Ed Cabell, Chairman  
JONES METROPOLITAN ADVISORY COUNCIL

Diana Robinson, Program Director  
Chicago Academy of Finance  
HAROLD WASHINGTON COLLEGE

**PRESENTATION OF AWARDS**  
Principal, JONES METROPOLITAN HIGH SCHOOL  
Cozette Buckney

### RECEPTION

#	WILLIAM EARL ALEXANDER	TAMARA MCKENZIE
*#	NORMA ARANDA	EBONI MILLER
	ASANTEWAA BEASLEY	LATREA MORROW
	LAKENA BOYD	TIMOTHY PARKER
	CEETTER CARPENTER	TEKENYA PEEK
	NICOLE CLARK	IVY K PORTER
#	WILLIE CURRY	HUBERT PTAK
	PELIAR DURDEN	DEBORAH RAINEY
*#	GIOVANNA ESPINOZA	ESMERALDA ROQUE
*#	ADRIENNE FARMBY	HELEN RUCKER
*#	JOHN FREDERICK	SONNELLA RUSSELL
#	GINA GRIFFIN	PAT SAN MARTIN
*#	SALVADOR GUERRERO	BEATRIZ SANCHEZ
*#	LATRESE HARDNICK	IRMA SANCHEZ
	LESLIE HULL	CHERYL ANN SCOTT
#	GRACIELA ITURBE	TIFFANY THAMES
*	TANYA J. JACKSON	TASHA UNDERWOOD
*#	JERETHEAM JONES	VERA NORA
	CHERRIE LITTLE	JAIME VILLANUEVA
#	JACQUELYNE LITTLE	SHANTII WILSON
#	VENITA LOCKETT	TAMARA WRIGHT

\* Denotes Honor Roll  
# Denotes Perfect Attendance

ACADEMY OF FINANCE STAFF

MAGGIE CULVER - ACCOUNTING  
JOSEPH ZALE - ECONOMICS

MERYL TILLERY - FRENCH  
ANNIE MILLER - COORDINATOR

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*President*  
Effective Management Technologies

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*Principal*  
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*Vice-President*  
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*Assistant Superintendent*  
Chicago Public Schools

Chicago Academy of Finance

**DIANA L. ROBINSON** - Program Director  
Harold Washington College

**CHICAGO ACADEMY OF FINANCE**

at

**JONES METROPOLITAN HIGH SCHOOL  
OF BUSINESS AND COMMERCE**

**SALUTES**

**ARTHUR ANDERSEN & CO.**

**October 22, 1991**

*Sponsored by*

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and

**THE ADVISORY BOARD OF THE  
CHICAGO ACADEMY OF FINANCE**

**WELCOMES**

**ARTHUR ANDERSEN**

October 22, 1991

**PROGRAM**

**INTRODUCTION OF PRINCIPAL**  
AOF Junior Class President  
*Adrienne Fariby*

**WELCOME ADDRESS**  
Principal, Jones Metropolitan High School  
*Cozette Buckney*

**SPEAKERS**

*Michael L. Richards - Manager*

*Bruce J. Williams - Staff*

*Dallas Creitlon - Tax Consultant*

*Lauren Claire - Auditor*

**ARTHUR ANDERSEN & CO.**  
**CHICAGO ACADEMY OF FINANCE**

**INTRODUCTION OF CHARTER CLASS**  
Chicago Academy of Finance Coordinator  
*Annie B. Miller*

**REMARKS**  
Program Director  
*Diana Robinson*

**CHICAGO ACADEMY OF FINANCE**  
**JONES METROPOLITAN HIGH SCHOOL**

**CHARTER CLASS 1991**

<b>WILLIAM EARL ALEXANDER</b>	<b>TAMARA MCKENZIE</b>
<b>NORMA ARANDA</b>	<b>EBONI MILLER</b>
<b>LAKEISHA BEANS</b>	<b>LATREA MORROW</b>
<b>ASANTEWAA BEASLEY</b>	<b>SHANEAN NEWTON</b>
<b>LAKENA BOYD</b>	<b>TIMOTHY PARKER</b>
<b>CEETTER CARPENTER</b>	<b>TEKENYA PEEK</b>
<b>NICOLE CLARK</b>	<b>IVY K. PORTER</b>
<b>WILLIE CURRY</b>	<b>HUBERT PTAK</b>
<b>PELIAR DURDEN</b>	<b>DEBORAH RAINY</b>
<b>GIOVANNA ESPINOZA</b>	<b>ESMERALDA ROQUE</b>
<b>ADRIENNE FARMBY</b>	<b>HELEN RUCKER</b>
<b>JOHN FREDERICK</b>	<b>SONNELLA RUSSELL</b>
<b>GINA GRIFFIN</b>	<b>PATRICIA SAN MARTIN</b>
<b>SALVADOR GUERRERO</b>	<b>BEATRIZ SANCHEZ</b>
<b>LATRESE HARDNICK</b>	<b>IRMA SANCHEZ</b>
<b>LESLIE HULL</b>	<b>CHERYL ANN SCOTT</b>
<b>GRACIELA ITURBE</b>	<b>TIFFANY THAMES</b>
<b>TANYA J. JACKSON</b>	<b>TASHA UNDERWOOD</b>
<b>JERETHEAM JONES</b>	<b>VERA NORA</b>
<b>CHERRIE LITTLE</b>	<b>JAIME VILLANUEVA</b>
<b>JACQUELYNE LITTLE</b>	<b>SHANTTII WILSON</b>
<b>VENITA LOCKETT</b>	<b>TAMARA D. WRIGHT</b>

**ACADEMY STAFF**

**MAGGIE CULVER - ACCOUNTING**  
**JOSEPH ZALE - ECONOMICS**  
**ANNIE B. MILLER - COORDINATOR**

**CHICAGO ACADEMY OF FINANCE  
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Principal  
Effective Management Technologies

**Cozette Buckney**  
Principal  
Jones Metropolitan High School

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Vice President  
First National Bank of Chicago

**Alan J. Dean**  
Chief Financial Officer  
Chicago Board Options Exchange

**Sandra Filion Foster**  
Executive Director-Productive Chicago  
City Colleges of Chicago

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Arthur Andersen & Co.

**Christopher P. Gardner**  
Managing General Partner  
Gardner Rich & Co.

**Harry J. Haczak**  
Partner  
Coopers & Lybrand

Chicago Academy of Finance  
Administrative Staff

Diana L. Robinson - Program Director  
Violin Hughes - Coordinator, Harold Washington College

Program Office  
30 East Lake Street - Room 1105  
Chicago, IL 60601  
(312) 984-2775

**John M. Keller**  
Partner  
Arthur Andersen & Co.

**John M. Kiss**  
Partner  
Ernst & Young

**John W. Lombard**  
Associate Professor  
Chicago City-Wide College

**Loleta McDowell**  
Administrator-High School  
Service Center  
Chicago Public Schools

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Senior Vice President  
Shearson Lehman Bros.

**Bernice J. Miller**  
President  
Harold Washington College

**David Murray**  
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Vice President  
The Northern Trust Co.

**Bernard Spillman**  
Assistant Superintendent  
Chicago Public Schools

**INAUGURATION OF THE  
CHICAGO ACADEMY OF FINANCE**

**AT**

**JONES METROPOLITAN HIGH SCHOOL  
OF BUSINESS AND COMMERCE**

**AND**

**INTRODUCTION OF THE CHARTER CLASS**

September 16, 1991

Sponsored by

**THE CHICAGO PUBLIC SCHOOLS**  
in partnership with  
**THE NATIONAL ACADEMY FOUNDATION**  
and  
**THE ADVISORY BOARD OF THE  
CHICAGO ACADEMY OF FINANCE**

**CHICAGO AF**  
ACADEMY OF FINANCE

**INAUGURATION OF THE  
CHICAGO ACADEMY OF FINANCE  
AT  
JONES METROPOLITAN HIGH SCHOOL  
OF BUSINESS AND COMMERCE**

September 16, 1991

**PROGRAM**

**Welcome**  
**COZETTE BUCKNEY**  
Principal, Jones Metropolitan High School

**Introductory Remarks**  
**DONALD E. BROWN**  
Chair, Chicago Academy of Finance Advisory Board

**Introduction of the Charter Class**  
**COZETTE BUCKNEY**  
Assisted by Ann Miller, Teacher Specialist

**Remarks**  
**TED KIMBROUGH**  
Superintendent, Chicago Public Schools

**NELVIA M. BRADY**  
Chancellor, City Colleges of Chicago

**ISABEL STEWART**  
Director for Program Administration  
National Academy Foundation

**Recognition of Outstanding Board Contribution  
to Christopher Gardner**  
**DONALD E. BROWN**

**Concluding Remarks**  
**BERNARD SPILLMAN**  
Assistant Superintendent, Chicago Public Schools

**Adjourn to Reception**

Special Thanks to Ernst & Young for Printing this Program

**CHICAGO ACADEMY OF FINANCE  
JONES METROPOLITAN HIGH SCHOOL**

**CHARTER CLASS 1991**

William Alexander	Tamara McKenzie
Norma Aranda	Latrece Morrow
Lakeisha Beans	Shaneim Newton
Asantewaa Beasley	Timothy Parker
Lakena Boyd	Takenya Peck
Nicole Clark	Ivy Porter
Willie Curry	Hubert Pnak
Peliar Durden	Deborah Rainey
Giova Espiroza	Shelley Riggs
Adrienne Farmby	Esmeralda Roque
John Frederick	Helen Rucker
Gina Griffin	Beatriz Sanchez
Salvador Guerrero	Irma Sanchez
Latrece Harwick	Patricia San Martin
Graciela Iturbe	Howard Schabow
Tanya Jackson	Cheryl Scott
Jeretheam Jones	Tasha Underwood
Cherrie Little	Jaime Villanueva
Jacqueline Little	Tamara Wright
Venita Lockett	

**TEACHING STAFF**

**Maggie Culver - Accounting Teacher**  
**Joseph Zale - Economics Teacher**

**Ann Miller - Teacher Specialist**

**CHICAGO ACADEMY OF FINANCE  
ADVISORY BOARD MEMBERS**

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President  
Effective Management Technologies

**COZETTE BUCKNEY**  
Principal  
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First National Bank of Chicago

**ALAN J. DEAN**  
Chief Financial Officer  
Chicago Board Options Exchange

**SANDRA FILION FOSTER**  
Consultant  
Ketchum Public Relations

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Partner  
Arthur Andersen & Co.

**CHRISTOPHER P. GARDNER**  
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Gardner Rich & Co.

**HARRY J. HARCZAK**  
Partner  
Coopers & Lybrand

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**JOHN M. KISS**  
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Harold Washington College

**DAVID MURRAY**  
Partner  
Ernst & Young

**ROBERT SAUNDERS**  
Vice-President  
The Northern Trust Co.

**BERNARD SPILLMAN**  
Assistant Superintendent  
Chicago Public Schools

**MIKE TORTELLERO**  
Mgr., Finance/Operations  
American Express Travel

**Chicago Academy of Finance**

Diana L. Robinson - Director

**Jones Metropolitan High School**

Annie Miller - CAF Coordinator  
Maggie Culver - Accounting Instructor  
Ana Hébert - French Instructor  
Meryl Tillery - French Instructor  
Earl Silverman - Financial Planning Instructor  
Joseph Zale - Economics Instructor

*Special Thanks to James Carey and William Miceli, Assistant Principals*

**Harold Washington College**

Viola Hughes - Student Resource Manager

**RECEPTION FOR STUDENTS OF THE  
CHICAGO ACADEMY OF FINANCE  
AT  
JONES METROPOLITAN HIGH  
OF BUSINESS AND COMMERCE**

**AND  
HAROLD WASHINGTON COLLEGE**

June 16, 1992

Sponsored by  
**The Chicago Academy of Finance  
Advisory Board**

Hosted by  
**Coopers & Lybrand**

## PROGRAM

### Welcome

HARRY HARCZAK  
Coopers & Lybrand

### Recognition of Special Guests

DIANA L. ROBINSON  
Director, Chicago Academy of Finance

### Introductory Remarks

DONALD E. BROWN  
Chair, Chicago Academy of Finance  
Advisory Board

### Award of Certificates of Completion

DONALD E. BROWN  
CHRISTINE A. FRANZ  
Dean, Faculty and Instruction  
Harold Washington College

### Awards for Honor Roll and Attendance

COZETTE BUCKNEY  
Principal, Jones Metropolitan High School  
ANNIE MILLER  
Coordinator, Chicago Academy of Finance  
Jones Metropolitan High School

### CONCLUDING REMARKS

Diana L. Robinson

## CHICAGO ACADEMY OF FINANCE STUDENTS

### Graduates from Harold Washington College

LaShaun D. Anderson  
Mitz J. Baker  
Kevin R. Cason  
Sheila R. Clayton  
Karl V. Wilson

### Jones Metropolitan High School Charter Class

• William Earl Alexander	• Tamara Mckenzie
# Norma Aranda	Eboni Miller
Asantewaa Beasley	Latrea Morrow
Lakena Boyd	Timothy Parker
Ceeter Carpenter	Tekeya Peek
Nicole Clark	• Ivy K. Porter #
Willie Curry	• Deborah Rainey
# Peliar Durden	Esmeralda Roque
# Giovanna Espinoza	Helen Rucker
Adrienne Fariby	Sonnella Russell
John Frederick	Patricia San Martin
Gina Griffin	# Beatriz Sanchez
• Salvador Guerrero #	Irma Sanchez
• Latrese Hardnick #	Howard Schabow
Leslie Hull	Cheryl Ann Scott
Graciela Iturbe	• Tiffany Thames #
Tanya J. Jackson	Tasha Underwood
• Jeretheam Jones	Nora Vera
Cherrie Little	Jaime Villanueva
Jacquelyne Little	# Shantii Wilson
• Venita Lockett #	• Tamara D. Wright
• Honor Roll	# Perfect Attendance

### Class Officers

Ceeter Carpenter - Secretary  
Adrienne Fariby - President  
Latrese Hardnick - Vice President

Cheryl Ann Scott - Treasurer  
Nora Vera - Associate Secretary

# STRATEGIES FOR SUCCESS FALL 1991

The Chicago Academy of Finance is again offering its "Strategies for Success" seminars to help Harold Washington College students gain the competitive edge in the business world. This school year the seminars will be offered during both the fall and spring semesters. For this Fall '91 semester, the seminars are scheduled for December 3, 5, 11, and 12. All seminars will be held in Room 304 from 1:30 to 2:30 p.m.

To reserve your space at one or more of these timely seminars, contact Violin Hughes at 984-2775 or stop by Room 1105.

## "THE ECONOMY AND YOUR CAREER: How to Plan in Uncertain Times" December 3, 1991

*Marya Kovacik, Senior Staff Development Specialist*  
The Northern Trust Company

Back by popular demand, Ms. Kovacik will conduct a workshop to help you identify and prioritize your career options. Don't let economic uncertainty stand in the way of the job you want! Come to this seminar and take control over your future.

## "FINANCIAL PLANNING FOR STUDENTS" December 5, 1991

*Mel Stoesser, Assistant Manager*  
Consumer Credit Counseling Service

Managing your budget is always a challenge for students, and is even more difficult when economic times are tight. This seminar is geared to the business student who must juggle the budget demands of school, student loans, family and a social life. Learn how to make even a small income work for you!

## "THE NEW RESUME" December 11, 1991

*Tony Fuller, Assistant Director of Recruiting*  
Arthur Andersen & Co.

You need every competitive edge you can get in today's job market. Because your resume is usually the first contact you have with an employer, make sure it effectively sells you. A top recruiter will share his insights and let you know what works in a resume.

## "HOW TO READ THE WALL STREET JOURNAL" December 12, 1991

*Bob Chrismer, Vice President, First Chicago Corp.*  
*Jack Lombard, Associate Professor, City-Wide College*

Don't be daunted by the seemingly impenetrable Wall Street Journal. Let a banking executive and a college professor demystify the nation's leading financial newspaper. Learn how the Journal can be an essential tool for school and business.

# THE CHICAGO ACADEMY OF FINANCE

## Strategies for Success - Spring 1992

**"Networking: A Lesson In Who You Know"**  
March 18, 1992, 1:30 - 2:30 p.m.

"Its not always what you know, but who you know." Find out how to make this maxim work for you. Come to this seminar for tips on identifying and cultivating the people who can help put you on the right career path.

**"New Career Forum: Trends and Opportunities in Financial Services"**

Banking - March 25, 1992, 1:30 - 2:30 p.m.  
Securities, Commodities and Brokerage  
- April 1, 1992, 1:30 - 2:30 p.m.  
Insurance - April 8, 1992, 1:30 - 2:30 p.m.

Right-sizing, restructuring, re-engineering. What do these three terms have in common? **CHANGE!** These are just three of many terms used in major corporations to mean that positions have been eliminated, upgraded or automated. These seminars will provide you with information on how restructuring has affected career opportunities in three key financial services sectors.

*All "Strategies for Success" seminars will be held in HWC Room 401. Reserve your space by calling 984-2775 or dropping by the Chicago Academy of Finance office in HWC Room 1105.*

# JONES REPORTER

VOL. 22 - NO. 1

JONES METROPOLITAN HIGH SCHOOL OF BUSINESS &amp; COMMERCE

SEPTEMBER 1991



Christopher P. Gardner,  
Manager, Gardner Rich &  
Co. Chicago Academy of  
Finance Advisory Board.

Nelvin M. Brady,  
Chancellor, City Colleges  
of Chicago, Chicago  
Academy of Finance  
Advisory Board.

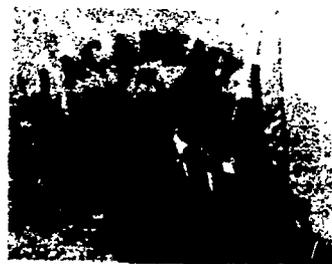
Susan Zimny, Director  
for Program Adm.,  
National Academy  
Foundation.

Bernard Spillman,  
Assistant Superintendent  
Chicago Public  
Schools.

Annie B. Miller, Academy  
of Finance, Teacher  
Specialist, Jones  
Metropolitan High  
School.



Diana Robinson, Director of  
Programs, Harold Washington  
College.



Donald E. Brown, Chairman  
Chicago Academy of Finance  
Advisory Board, President  
Effective Management Technologies

## Initiation Of The Academy Of Finance

by Anabel Andrango

As all of us waited anxiously for the commencement of the program, I was able to talk to a parent and ask her reaction to this ceremony for the students who are part of Academy of Finance.

She was very proud of her daughter and she was so excited as she had never experienced such an occasion.

Finally, Mrs. Buckney came up to the podium and requested everyone's attention to the beginning of the program. First she expressed her emotions about the Academy of Finance. "We have worked diligently with the Business Council for over six months to be able to have this moment."

Donald E. Brown, Chair of the Chicago Academy of Finance Advisory Board was next on the podium. His expressions of endearment were something like this: "I feel like a proud father today! For six months I have been waiting for this baby." The surprise was that each and every single student of the Academy of Finance would qualify for a scholarship which would in turn enable them to go to any college they would like to attend. The requirements were: 1) The student must be eager enough to want to go to college. 2) A student must be enrolled in the Academy of Finance curriculum. 3) Also the students who are satisfactorily in the curriculum will also have a paid summer internship which will be in the business community. 4) The student, in order to receive a scholarship, must have a B plus average, and have a 95 percent attendance rate to qualify.

After the presentation by Mr. Brown, Mrs. Buckey and Ms. Ann Miller introduced the charter class of the Academy of Finance.

The students were: William Alexander, Norma Aranda, Lakeisha Beans, Asantewaa Beasley, Lakena Boyd, Nicole Clark, Willie Curry, Peilar Durden, Giovanna Espinoza,

Cherrie Little, Jacquelyne Little, Venita Leckett, Tamara Mckenzie, Latre Morrow, Shanceen Newton, Timothy Parker, Tekanya Peek, Ivy Porter, Hubert Prak, Deborah Rainey, Shelley Riggs, Esmeralda Roque, Helen Rucker, Beatriz Sanchez, Irma Sanchez, Patricia San Martin, Howard Schabow, Cheryl Scott, Tasha Underwood, Jaime Villanueva, Tamara Wright.

Next up was one of the most influential ladies, Diana Robinson, the Chair for City Colleges of Chicago. She emphasized the fact that Jones Metropolitan High School is the only high school to have such a curriculum and the only one to have an internship program in the business community. The only one in the city of Chicago! What an honor.

Following Diana was the Superintendent of Chicago Public Schools, Ted Kimbrough. He has been in public education for over 36 years and he was also a principal of a school but he mentioned he had never seen such motivation in a class. One thing he made clear was that 95% of the class was a minority. But this was a good sign to the business community, for it shows the minority groups are recognizing the value of an education and especially in the business environment. One of the speakers said she felt as if she had given birth to the greatest thing ever. "I've just gone through an immaculate conception!" But in general each speaker was proud to say that this was the future generation of the work force. And they're pretty happy it's people with such a background, not only educational terrain but also a wide variety of backgrounds such as ethnic, cultural and basically moral. At the Jones Reporter we hope that these students realize that they have a chance in a lifetime and that they shouldn't waste it. We wish you the best and hope you come out on top just like all Jonesites do when they are doing their best.

**BEST COPY AVAILABLE**

# Academy of Finance Breakfast Meeting

## THE ACADEMY OF FINANCE SALUTES ARTHUR ANDERSEN

by Lilianna Cortez

On Tuesday, October 22, 1991, the Academy of Finance saluted Arthur Andersen & Co. during a breakfast meeting here at Jones Metro.

Although I was a few minutes late for the meeting, I was there on time to listen to the first speaker, Michael J. Richards, with whom I had the pleasure to speak. He spoke of the company's distribution of 300 offices in 36 countries, and its primary business that is accounting. Mr. Richards is the manager and he has many duties besides being manager, such as helping other companies with bookkeeping; providing services to help customers with accounting; and working in the consulting division helping computerized companies to run their systems.

Next up to the podium was Dallas Creitlon, who is a tax consultant for Arthur Andersen & Co.. He works in the consulting division designing computer systems for different companies that will aid them with their personal accounts, and is currently working on a system of personal computers for managers.

Introduced next was Lauren Claire, who works in the Audit Section. She has worked for Arthur Andersen & Co. for two years. In the Audit Section some of their duties are to prove what their clients own and possess is legal and true, and they issue control letters.

Up next was Bruce Williams, who is responsible for staff and works in the tax division. He mostly works helping to set up divisions that strictly work with wealthy families to prepare their tax returns. Their commercial division is a multinational corporation.

After all the guest speakers stepped up to the podium, Ms. Miller made an introduction of the Chicago Academy of Finance Charter Class of 1991, and introduced the Academy staff teachers: Ms. Maggie Culver, Accounting; Mr. Joseph Zale, Economics; Ms. Merle Tillery, French; and of course Ms. Miller herself as the Academy of Finance Coordinator.

Afterwards there was a special thanks given to Mr. David Rosen from the Chicago Board of Education and the students had the opportunity to ask questions to the special guest speakers.

Finally, there was a special recognition of the Academy of Finance class officers, who are:

**PRESIDENT:** Adrienne Farmby.

**VICE-PRESIDENT:** Latrese Hardnick

**SECRETARY:** Ceeter Carpenter

**ASSISTANT SECRETARY:** Nora Vera

**TREASURER:** Cheryl Ann Scott

The Academy of Finance students will have the opportunity to participate in a summer internship and each student is guaranteed a \$2,000 scholarship, based upon 95% attendance rate and 3.56 GPA.

All in all, this was a great opportunity for the Academy of Finance students to learn of the great and magnificent job world that awaits them. So, guys and girls, keep up the good work and show you're the best!



Lauren Claire of the Arthur Andersen Co. pictured at the breakfast meeting.



Michael Richards, Manager for Arthur Andersen & Co. and student Salvador Guerrero.



Members of the Jones staff, our principal and Diana Robinson of the Chicago Academy of Finance were present at the breakfast meeting.

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## Academy of Finance Hosts Northern Trust



John Frederick and Hubert Ptak meet William Satterstrom, Senior Vice President of Northern Trust.



Mike Tortorello of American Express (left, which will be guests of AOF in February) poses with speakers from Northern Trust Michele Clark, Robert Saunders, Graciela Hurbe, William Satterstrom, Mary Kovarik and John Frederick.



The representative from American Express Mike Tortorello talks with AOF students Giovanna Espinoza and Salvador Guerrero.

and dedication to be the best, and even if they were not on the honor roll, it doesn't mean they are not doing well." He is proud of the Jones students' initiative, and Jones will definitely set the pace for other schools.

Alan Dean was invited by Diana Robinson and was greatly impressed by our program. He admitted he didn't even know of Jones' existence, but his first impression of the Academy and Jones was so positive that he predicted that the commitment of the students and staff will help Jones to flourish.

## Northern Trust Bank Meets With The Academy Of Finance

by Tamara Wright

The Academy of Finance kicked off another successful breakfast for the month, which took place Wednesday, December 18, 1991. This is the third breakfast that the Academy of Finance has had and this time it was with The Northern Trust Company.

Many encouraging words were said by some important people. Those important people were William Satterstrom, Senior Vice President of Corporate Training; and Marya Kovacic, who designs and teaches courses for choice options. All were welcomed and greeted by the Academy of Finance students, staff and Cozette Buckney, our principal. The Academy of Finance was recognized for some outstanding accomplishments and for the enthusiasm that was shown to our guests. The Academy of Finance is making so many moves right now. This is the Charter Class of Academy of Finance and everyone is looking over each others backs to help. There's a lot of hard work and the taking of a lot of challenges but by having these breakfasts and meeting these important people, their encouragement helps us and our fellow classmates, and also our teachers, to go further with the Academy of Finance.

It is a great opportunity for anyone who wants to know what the work force is all about and what it takes to reach those standards that will help you achieve in getting into the work-force.

Along with Northern Trust Bank, Mike Tortorello, American Express, was here to acknowledge the Academy of Finance. That will probably be the next company that will meet with the Academy of Finance

## Recognition For Academy Of Finance Students

by Lilianna Cortez

On Tuesday, November 26, 1991, Jones hosted the Academy of Finance Awards Breakfast in the auditorium for in recognition of the students for their perfect attendance and academic achievement.

The event began with an introduction of our principal, Mrs. Buckney, by the AOF Junior Class President, Adrienne Farby. Mrs. Buckney gave a welcoming address to the students, staff, and special guest speakers—Donald E. Brown, Chairman of the Chicago Academy of Finance Advisory Board; Alan Dean, Chief Financial Officer of the Chicago Board Options Exchange; and Diana Robinson, the Chicago Academy of Finance Program Director. Each guest speaker presented remarks to the gathering, and the awards were then presented by Mrs. Buckney for perfect attendance and/or honor roll. After the awards presentation there was a reception given in the place of attendance.

In an interview with Diana Robinson, she said that "the success of Jones will determine if the AOF program expands into other high schools." She also gave the three major reasons of why Jones was chosen for the program: (1) for being a unique school and the only high school in the country that's a two-year business high school; (2) Jones is Business; and (3) Jones has serious business ties with the business community, giving many job opportunities for the students.

Donald E. Brown said of the students that "just being in the program inspires them to dedicate themselves. They all show expertise

(Continued on page 4 above)

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**"Academy Of Finance  
Salutes First Chicago  
National Bank"**

by Lilliana Cortez

On Wednesday, January 29, 1992, the Academy of Finance had the honor to have four guest speakers from the First Chicago National Bank, located in downtown Chicago.

The breakfast meeting began with an introduction by AOF Junior Class Secretary, Ceeter Carpenter, who then made for the welcome address by Mrs. Buckney. The first guest to step up to the podium was Steven Capouch, Vice-President of First Chicago. He has been with the corporation for 13 years, and also on the Chicago Academy of Finance Board for 3 years. He stated that the bank has various locations in the country and this past year it had \$49 billion in assets. First Chicago is a large corporate business involved in regular transactions. Next was James Lowry, and after him James Mason, both first Scholars at First Chicago. Both talked about their experiences during the summer internship at First Chicago, and who are now currently employed at the bank. James Lowry attended Princeton University and James Mason attended Washington State University. Last to the podium was Levoyd Robinson, Corporate Banking Officer. Mr. Robinson has been with the corporation for three years, and his primry job is to call people who have not paid their loans. He received his M.B.A. from Northwestern University.

In an interview with Steven Capouch and Levoyd Robinson, I learned Mr. Capouch is in charge of the training program, and both stated that it really doesn't matter if you attend a city college. They help companies with their debts and/or figure solutions. Currently there are 17,000 people employed in the corporation, and every year they employ 500-600 people. They are always looking for smart people, but all four strongly emphasized that the main skills to succeed in the working world are to have good communication, writing, and analytical skills, but most importantly good communication skills, since that is what has put First Chicago ahead.

The February breakfast meeting will honor students on academic achievement and perfect attendance. The purpose of these meetings with high corporate executives give students the opportunity to excell and strive for more; a special recognition for the teachers involved in the academy program.

## Academy Breakfasts With Shearson Lehman And Atlanta AOF

by Tamara Wright

The Academy of Finance has been having a tremendous number of successful breakfasts, and now Shearson Lehman Brothers can be included with the other successes.

Shearson Lehman Brothers attended a breakfast with the Jones AOF on March 27th, in the auditorium foyer. Excellent speakers represented the financial services corporation: Gloria McMahon, Senior Vice-President; Lawrence Geraghty Jr., Senior Vice-President; Michael Skinner, Vice-President; and Al Thomas, Financial Consultant, who left us with this thought, "Going and getting the education is worth it. Stick to your educational goal." Some of the speakers told the AOF how they came to join Shearson Lehman, as well as about Shearson Lehman's predecessors and the company's history.

Not only was Shearson Lehman Brothers represented at the March breakfast, but the Atlanta Academy of Finance joined us at the same time. The Atlanta group, which had flown in on the 25th, enjoyed Shearson Lehman's presentation as much as the Jonesites did, and continued their trip to Chicago with a sight-seeing tour of the downtown area; they rounded out their day with attendance at the AOF Dance which was held the evening of the 27th in the Jones gymnasium.

The Atlanta AOF had a wonderful time, and told us that they loved Chicago. Thanks to the Advisory Board; Diana Robinson, Director of AOF; Dr. Buckney, and Ms. A. Miller, Coordinator of our AOF, for making all this possible.

A special apology to American Express for their inadvertent omission from last month's issue of the REPORTER. We appreciated American Express' taking the time to speak to the young Jonesites who are always eager to know about the workforce and what it takes to survive.



## Academy of Finance Dance

by Duane Porter

The Academy of Finance dance, "You're Breaking My Heart", was held in the Jones gymnasium on Friday, March 27th, and it was a great success, due to the hard work of the Academy students and their sponsors, Mrs. Culver and Mrs. Miller.

The dance's success was further insured by the DJ, the one and only Emanuel Pippet, who started the party jumping with his musical selections.

Joining the Jones AOF students were members of the Atlanta AOF, who had joined Jones at the AOF breakfast with Shearson Lehman Brothers earlier in the day.

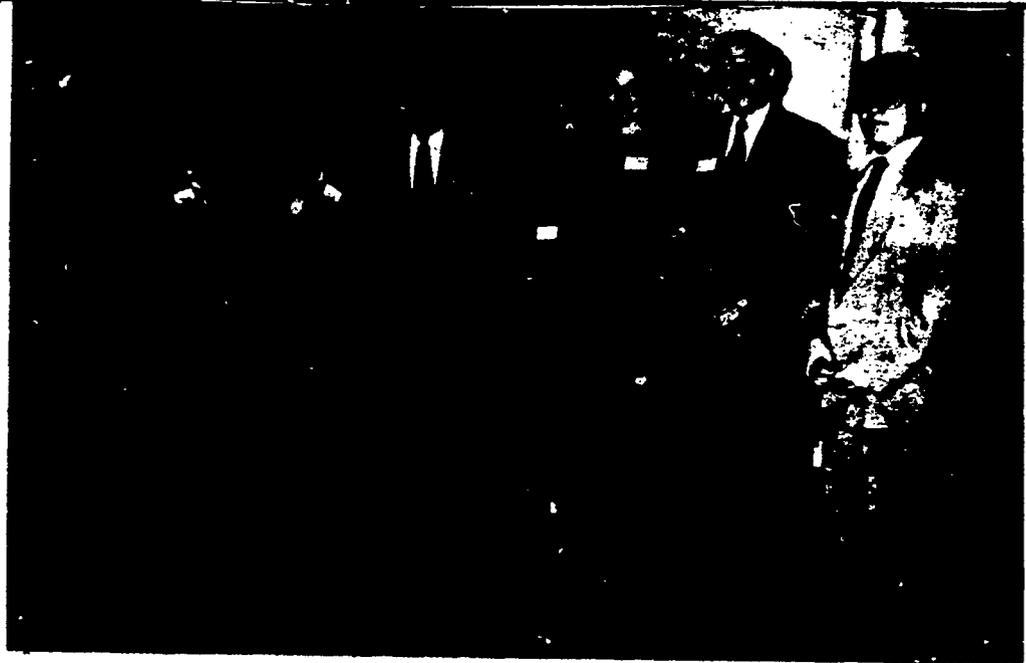
The dance was also the setting for the announcement of the choices for Mr. and Ms. Academy of Finance, 1992. Mr. and Ms. Academy of Finance were William Alexander and Latrece Hardnik. Timothy Parker and Tamara Wright were the runners-up.

# JONES REPORTER

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JUNE 1992



The Jones Academy of Finance hosted a breakfast for Ernst and Young on April 22, 1992, in the auditorium foyer. Participating (Left to right) were: Ms. M. Culver, accounting teacher; Ms. A. Miller, Jones' AOF coordinator; Gina Griffin, AOF student; Erik Nance, Jr., and Felicia Haraway, Junior Account Executives, Ernst and Young; Diana Robison, Program Board; and Salvador Guerrero, AOF student.

## ACADEMY TO ADMIT FRESHMEN

by LaTrese Hardnick

Jones is going to have another first, this time in September of 1992. This September, we are going to have 28 ninth-graders, who will be the Pre-Academy of Finance Students.

Students were selected for the program based on their interest in Pre-Academy programs, academic performance, a 95% attendance rate, and above-average stanine levels on the Iowa Test of Basic Skills.

In addition to the required high school classes, the Pre-Academy students will take key boarding and accounting to help prepare them for the intensive two-year Academy program. Students will also be exposed to the unique business environment here at Jones.

This two-year Pre-Academy program will insure that students interested in business are prepared to enter and be successful in the Chicago Academy of Finance.

## Academy Program Wins Award

On June 11, Jones principal Dr. Buckney accepted the "Connections 2000 Ideas Program" award, presented to educators who have exhibited innovative techniques for integrating curriculum across disciplines, including the integration of academic and technical content.

The award was presented in Springfield at the Connections 92 Conference for Jones' new Academy of Finance program.

Jones was the only Chicago Public School to receive this award.

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